



IC Server Manager Administrator

Printable Help

PureConnect powered by Customer Interaction Center® (CIC)

2018 R3

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Abstract

This document is a printable version of the IC Server Manager Administrator help.

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Introduction

IC Server Manager Administrator allows you to view and maintain keyword sets that are used by Interaction Analyzer to detect words or phrases and identify and mark the location in the recording where the words or phrases were spoken. CIC subsystems use this information to evaluate customer interactions. The Interaction Administrator module is available in IC Server Manager.

For more information, see [About IC Server Manager Administrator](#).

About IC Server Manager Administrator

IC Server Manager Administrator allows you to configure the following administrative items through the Server Manager interface:

- Users
- Workgroups
- Roles
- Skills
- Schedules
- Access control groups
- Wrap-up codes
- Wrap-up categories
- Account codes
- Account codes global settings
- DID/DNIS mappings
- Client templates
- Managed IP phones
- Response management items
- Interaction Analyzer keywords and keyword sets
- Layouts
- Metadata and custom parameters for reports

For information about using the Server Manager user interface, see "Getting Started" on the Help menu.

A note about client applications: Customer Interaction Center (CIC) supports two interaction management client applications. This documentation uses the term "CIC client" to refer to either Interaction Connect or Interaction Desktop.

Users

In CIC, a user is someone who has a valid domain user name and an associated mailbox user profile on the network mail server (for example, Exchange Server or Notes server). Each user must have a name that is registered as a valid network account and email user account before the user can receive calls on the CIC system.

Users have their own extensions separate from physical station devices. Users may have their own call routing preference separate from phone devices, as well. This allows users to log in to the system from any station or remote location.

Note: The above information does not apply to Interaction Message Store users. Interaction Message Store uses mailboxes that are kept on the IC server, so network mailboxes are not required.

The **View Users** page displays users in a list in the master view, and displays details of the currently selected user in the details view. You can take actions on the users in the list view, such as edit, delete or copy, and you can add a new user. You can change the way the list is displayed, such as change visible columns, sort by column, and filter.

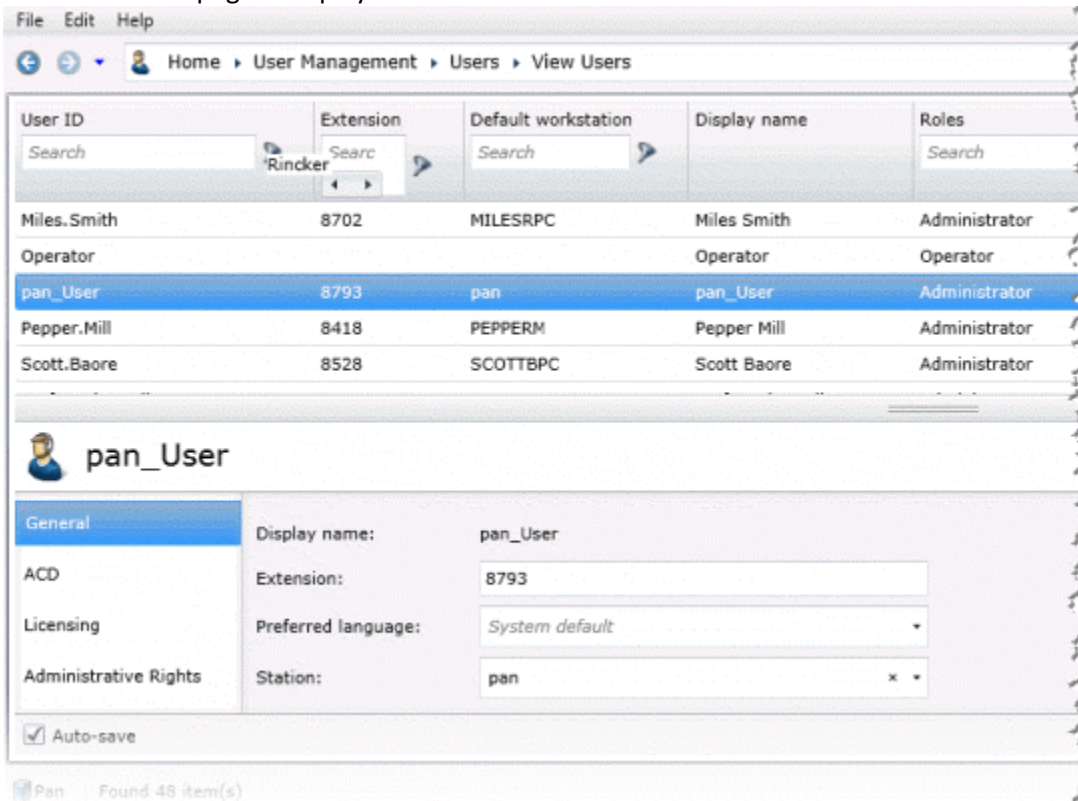
To view users:

1. Click the **View Users** action under the **User Management** category:



...or Click **View Users** in the breadcrumbs if available.

2. The **View Users** page is displayed.



3. The details of the selected user are displayed in the details view.

Related Topics:

Introduction to Interaction Administrator Web Edition

Add a User

User: General

The General details tab contains basic information, mailbox, membership, security and password policy configuration for the user. Click the name of the details tab for field descriptions.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

To complete the user's general information:

1. Click the **General** details tab to display the details view.
2. Complete the following information in the first section:
 - Type the **User ID**.

Notes:

Do not use these characters: \ / : * < > |

Do not exceed 64 characters.

- Type the **Extension**.
- Select the **Preferred Language**. You can filter the list by typing in the drop-down box.

- Select the **Station**. You can filter the list by typing in the drop-down box.

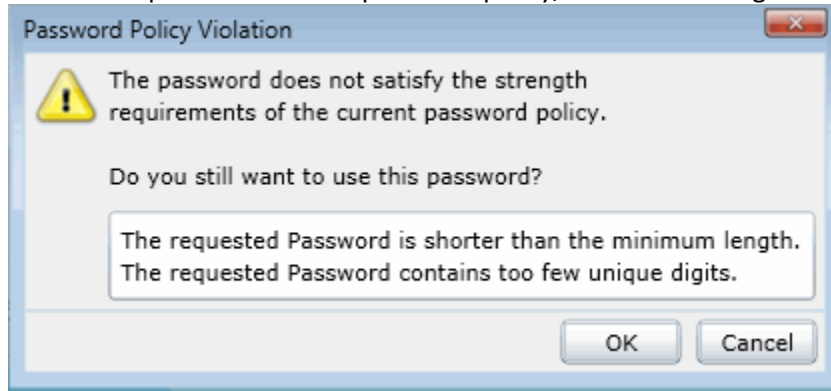
- To display the access control groups membership available, click the icon.



and select the **Access Control Group** from the list to assign to the user.

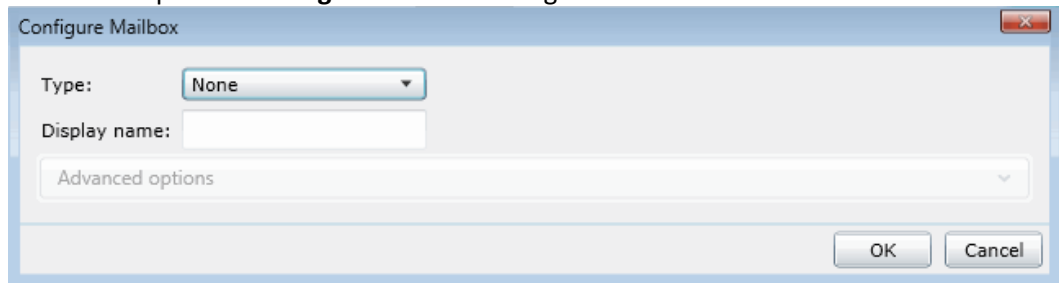
- Type the **Windows Domain Account**.
- Type the **New Password**. If the **New Password** and **Confirm** fields do not match, a message is displayed:

If there is a problem with the password policy, violation message is displayed:



- Retype the password to **Confirm**.
3. Click Mailbox section expander to display (or hide) the mailbox section's contents, and complete the following information:

- Click  to open the **Configure Mailbox** dialog box.

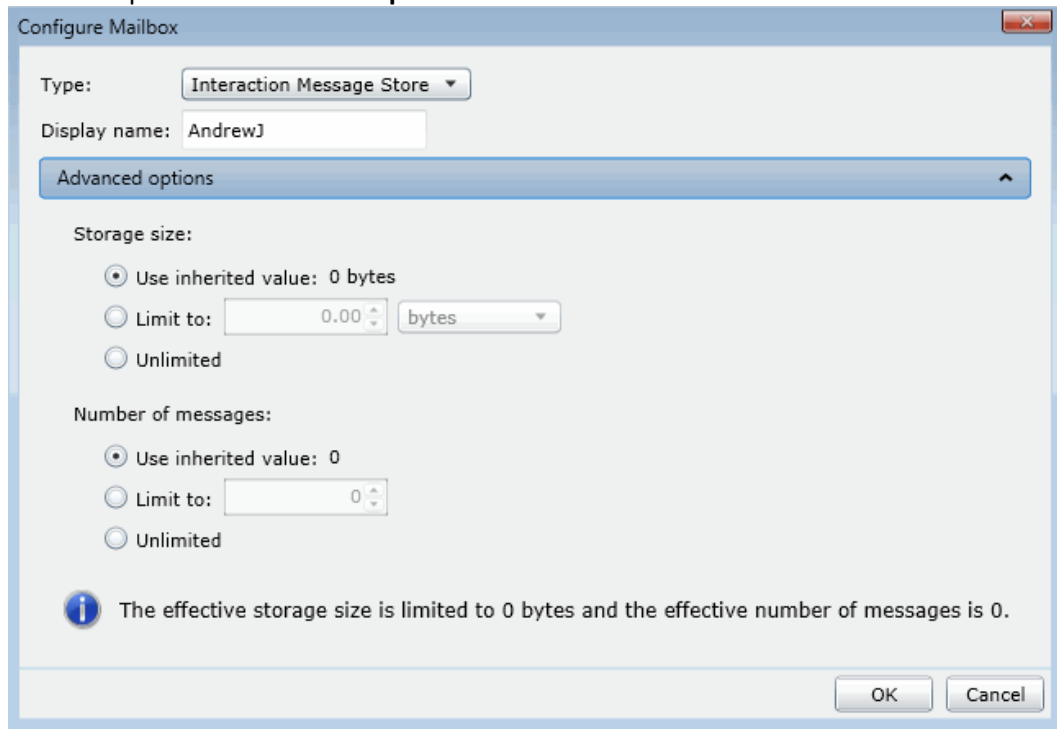


- Select the from the **Type** drop-down box.

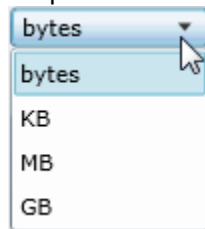


- Type the **Display Name**.

- Click to expand the **Advanced Options**:




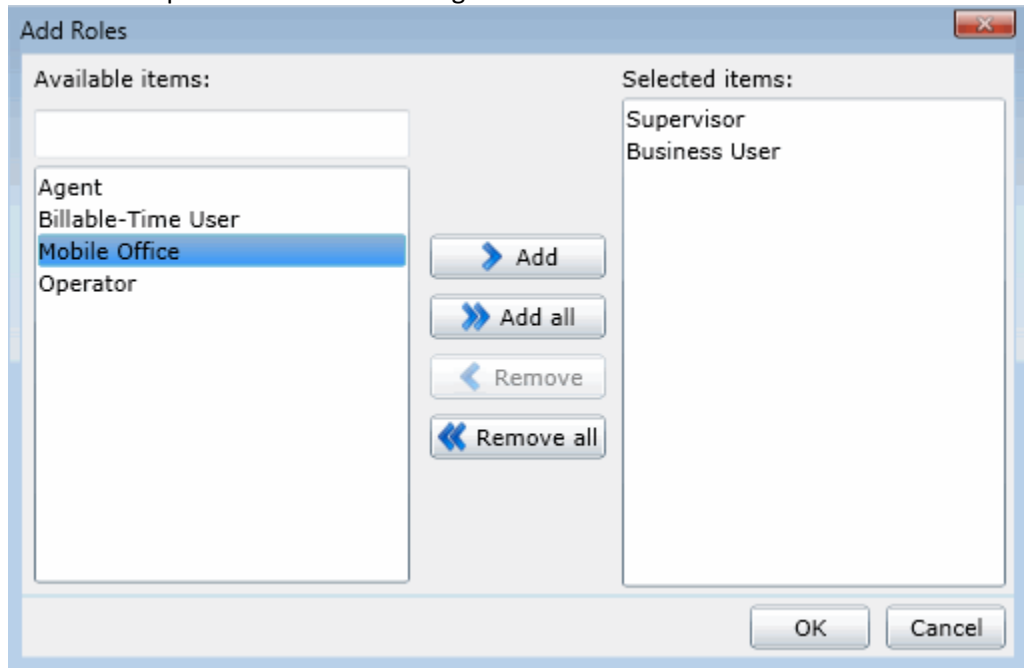
- Click on the radio button to select the **Storage Size**. If **Limit to:** is selected, use the up and down arrows to set the size or type in the text box, and select the units from the drop-down box.




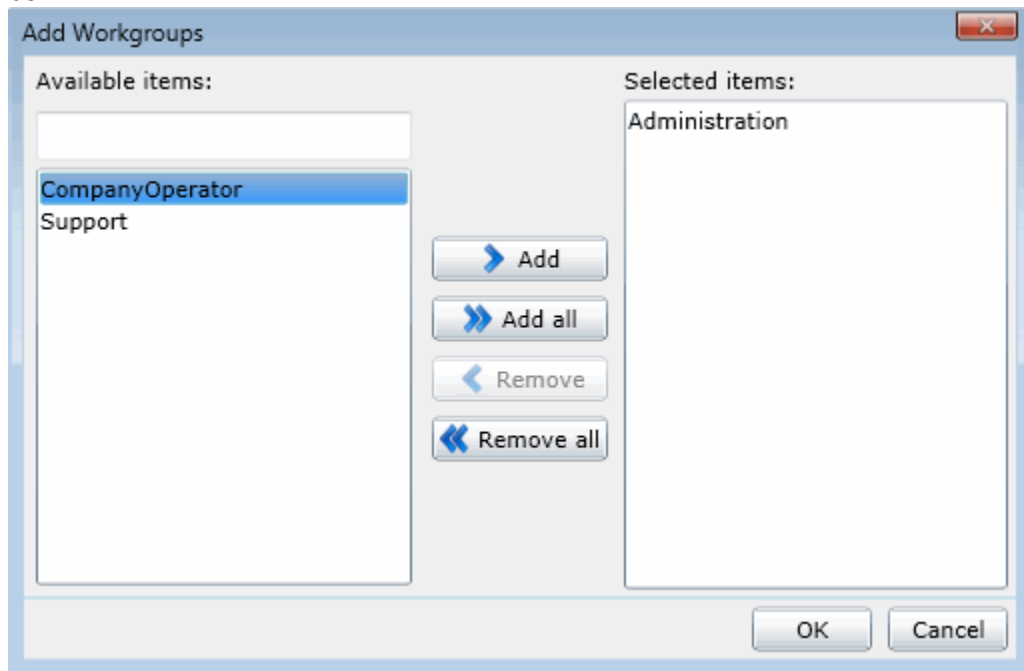
- Click the radio button to select the **Number of Messages**. If **Limit to:** is selected, use the up and down arrows or type in the text box to set the number.

4. Click the Membership section expander to display (or hide) the membership section's contents, and complete the following information:

- Click  to open the **Add Roles** dialog box:




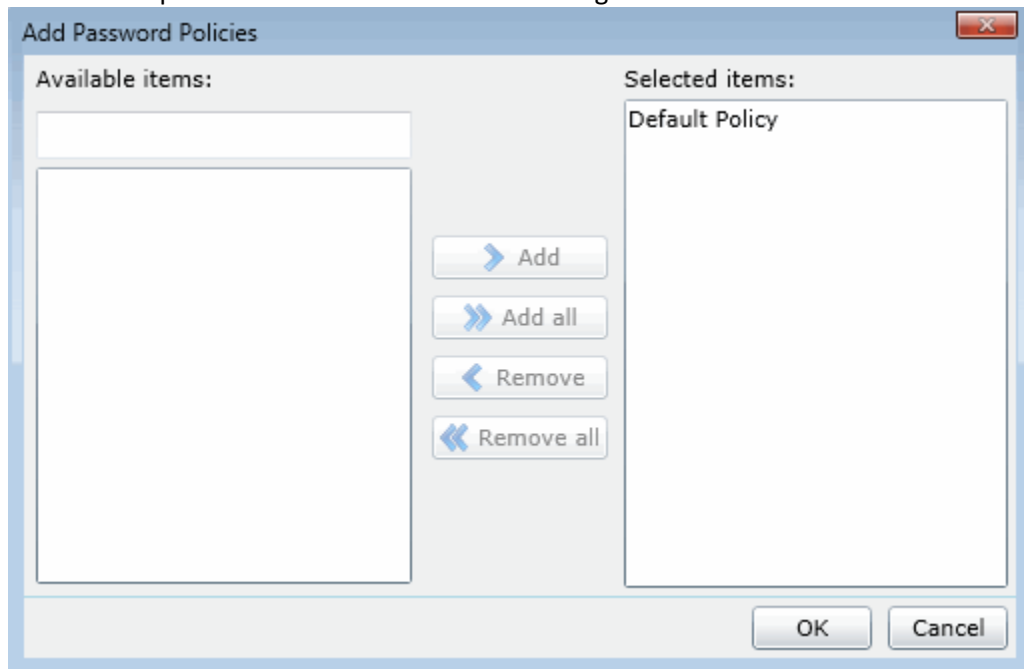
Select one or more roles in the **Available** items list, and click **Add** to add the role(s) to the **Selected** items list. You can also click **Add all** to add all roles. To filter the list of roles, type in the filter field above the list. Click  to open the **Add Workgroups** dialog box:



Select one or more Workgroups in the **Available** items list, and click **Add** to add the workgroup(s) to the **Selected** items list. You can also click **Add all** to add all workgroups. To filter the list of workgroups, type in the filter field above the list.

5. Click the Security section expander to display (or hide) the security section's contents, and complete the following information:

- If the user is a master administrator, select the **Is a master administrator rights** check box.
Note: Only a master administrator can select this check box. See the field descriptions for more information.
 - To allow the user to edit [administrator rights](#), select the **Can edit administrative rights** check box.
 - To allow the user to edit [access control rights](#), select the **Can edit access control rights** check box.
6. Click the Password Policies section expander to display (or hide) the password policies section's contents, and complete the following information:
- Click  to open the **Add Password Policies** dialog box:

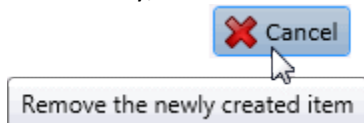


Select one or more Password Policies in the **Available** items list, and click **Add** to add the policy(s) to the **Selected** items list. You can also click **Add all** to add all policies. To filter the list of policies, type in the filter field above the list.

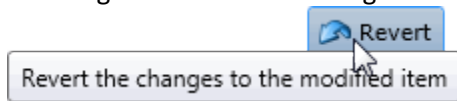
7. Save the new user or modified user.



If necessary, the new user can be removed:



or changes made to an existing user can be reverted.



Related Topics

[User: ACD](#)

[User: Licensing](#)

[User: Administrative Rights](#)

[User: Access Control Rights](#)

[User: Security Rights](#)

[User: Personal Information](#)

[User: Advanced](#)

User: General Field Descriptions

This topic contains the descriptions for each field in the **General** details view under the **View Users** page.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see [About the Enhanced Interaction Administrator Change Log](#).

User ID (Display Name)

This is the unique user identification and is displayed by default in the View Users page. This is the log on name for this CIC user. CIC uses this field to automatically authenticate that the CIC user has a valid account on the IC server. The CIC user logged in with this name can start CIC applications and CIC authenticates this user as a form of security. This prevents non-CIC users from starting an CIC application (such as the CIC clients). **This field is required, and defaults to "New Item"**. After saving a new user this information is displayed in the user's header bar. It is also displayed in the **Display name** field, unless the user has a display name stored with the mailbox, then the *mailbox display name* is shown in the display name field. Otherwise, the user ID is shown.

Notes:

Do not use these characters: \ / : * < > |

Do not exceed 64 characters.

Extension

This is a unique extension number associated with this user. When this user logs on to the network, the CIC system detects that user's presence (by his or her extension) and routes interactions to the station where the user is logged on. If the user is logged on to more than one station at the same time, all connected stations ring when an interaction is received for that user, regardless of the station's extension number. This field can contain only numerical characters.

Preferred Language

This is the preferred language used for the prompts for this user. The default setting is *System default*.

Station

This is the name of the station primarily associated with the user's account. You can select an existing station. If a station is not specified, *No Station selected* is displayed.

Access Control Groups

An access control group (ACG) is a group of administrative rights. When an ACG is added to the user, the user takes on those ACG's rights. The user can be assigned to only one ACG.

Note: Access Control Groups appear if they have been configured in your environment. If Access Control Groups have not been configured, this field is not displayed.

Windows Domain Account

Type the domain qualified user log on name for this CIC user (for example, CorpDomain\SonyaM). CIC uses this field to automatically authenticate that the CIC user has a valid account in the network domain. With the appropriate value in this field, the CIC user logged in to the domain with this name can start any CIC application and CIC automatically authenticates this user as a form of security. This prevents non-CIC users from starting an CIC application (such as the CIC clients) and running it on the network.

If this field is blank, CIC attempts to validate a CIC user from a cached list of valid IC accounts created the first time each user logs on to CIC. If CIC cannot reconcile a CIC user account with a known Windows user account, an application may present an CIC logon dialog to give the user an opportunity to enter valid CIC account names and passwords.

New Password

Type a password of any length or any characters (uppercase and lowercase characters are significant) as long as it satisfies the [password policy](#). The field is initially displayed as one or more "*" characters. Keep in mind that remote callers may have to enter this password from a phone key pad. This password is required for some IC operations, such as remote voice mail retrieval, remote CIC client connections, and Forced Authorization Codes. It is not required for local CIC client use.

Once a password has been confirmed, this field and the **Confirm** field are hidden and the **Change the password for this User** check box is displayed. Select the check box to enter and confirm a new password.

Confirm

This field must match the password entered exactly. Failure to match, results in a password violation.

Mailbox Type


Select **Interaction Message Store** to store voice mail and faxes as files on the IC server (small implementations), or a network file server (large implementations). Users are associated with mailboxes in a file directory structure, and voice mails and faxes are routed to these mailboxes. CIC users can access voice mail messages from the client or the telephone keypad (TUI). CIC client users can view faxes in Interaction Fax or in the default Windows application for .TIF files.

Leave the type as "None," if you do not want a mailbox associated with this entry. If the mailbox type is **Interaction Message Store**, you can specify advanced options (click the **Advanced Options** section expander).

Display Name

This is the display name of the user regardless if there is a mailbox assigned to the user. If there is a mailbox assigned, then this display name is used for the "From" field in email sent from this account.

In Advanced Options - Mailbox

These options are available in the Interaction Message Store configuration page opened when clicking .

Storage Size

Enter the maximum amount of storage space (in bytes, KB, MG, or GB), to allocate messages. By default, the setting uses the inherited value. Select **Unlimited** to not set a limit on space used to store messages.

Number of Messages

Enter the maximum number of messages to allocate messages. By default, the setting uses the inherited value. Select **Unlimited** to allow any number of messages.

Membership

The membership section includes roles and workgroups that the user is a member.

Roles

A role is a set of permissions. Typically, each job (or position) in an organization has a role containing rights necessary for that position. When a role is added to a user, the user takes on the associated permissions. The default roles are:

- Administrator
- Supervisor
- Agent
- Operator
- Business User
- Billable-Time User
- Mobile Office

Workgroups

A workgroup is a logical group of users (for example, departments) that can function as a group in the CIC system. A workgroup can have an extension that enables all members of the workgroup to receive calls notifying the workgroup. In addition, a workgroup can receive regular calls and ACD calls to specific workgroups and users.

Security

This section allows administrative and access control settings to be enabled or disabled.

Is a Master Administrator

Select this check box to give master rights to the currently selected user. Users assigned this right have master administrator rights to add, remove or change all security rights. When this check box is selected, all settings on the Administrator Access page are implicitly selected. Clear this check box to remove master administrator rights.

Anyone having master administrator rights can view and change everything in Interaction Administrator, and assign or remove all levels of rights for any other CIC account, including others with master administrator rights. All security pages (especially Administrator Access and Access Control) for the Default User, User, Workgroup, and Role containers are visible to master administrators. This is not the case for other accounts without master administrator rights.

Master administrators can grant individual users a range of access rights, which enable them to manage other CIC configuration resources. These rights can be very minimal, such as a user allowed to run Interaction Administrator to change only their own user and station configuration, or perhaps the user and station configurations for the members of a workgroup. In contrast, a master administrator can grant another user rights to create, modify, or delete any other CIC configuration resource in Interaction Administrator, including giving other users a subset of their own administration rights. Master administrators also control the appearance of the [Access Control](#) and [Administrator Access](#) pages for select users (other users do not have the option to control these pages).

Can Edit Administrative Rights

Select this check box to enable [administrative access rights](#) edits for this user. This disables access control rights edits for the user, and when clicking the [Access Control](#) button, an error message is displayed.

Can Edit Access Control Rights

Select this check box to enable [Access Control](#) edits for this user. This disables administrative access rights edits for the user, and when clicking the [administrative access rights](#) button, an error message is displayed.

Password Policies

A password policy is a set of rules that define how complex a password must be and how often a password must be changed. When a password policy is added to a workgroup or role, the user in that workgroup or assigned that role must have a password that adheres to the inherited password policy. If a user is a member of that workgroup or assigned that role, the user automatically inherits the password Policy assigned to the workgroup or role. The inherited password policies are displayed in the list. Policies added to the user, but are not inherited are displayed in (and can be added to) the list.

Related Topics

[User: General](#)

[User: ACD Field Descriptions](#)

[User: Licensing Field Descriptions](#)

[User: Administrative Rights Field Descriptions](#)

[User: Access Control Rights Field Descriptions](#)

[User: Security Rights Field Descriptions](#)

[User: Personal Information Field Descriptions](#)

[User: Advanced Field Descriptions](#)


















User: ACD

The ACD details tab contains utilization, effective utilization, skills, effective skills, statistics, and options configuration. Click the name of the details tab for [field descriptions](#).


Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

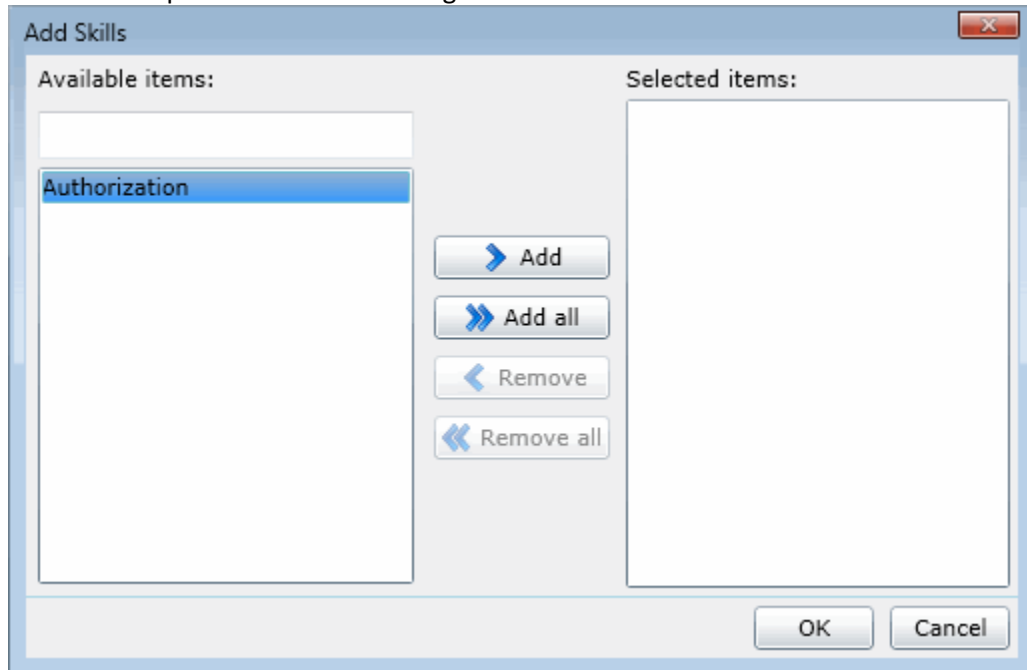
To complete the user's ACD information:

1. Click the [ACD](#) detail tab to display the details view.
2. Click the Utilization section expander to display the utilization section's contents, and complete the following information:
 - To override the interaction type's **% Utilization** and **Max Assignable** for each **Interaction Type**, select the **Override** check box, then use the arrow keys or type in the fields to set the values:

Interaction Type	Override	% Utilization	Max Assignable
 Callbacks	<input checked="" type="checkbox"/>	0 %	2 
 Calls	<input type="checkbox"/>		
 Chats	<input type="checkbox"/>		
 Emails	<input type="checkbox"/>		
 Generic Objects	<input type="checkbox"/>		
 Work Items	<input type="checkbox"/>		



3. Click the Effective Utilization section expander to display (or hide) the effective utilization section's contents:
 - View the inherited information for utilization percentages, if any utilizations have been overridden, or if the user is a member of an ACD workgroup that has configured utilizations.
4. Click the Skills section expander to display (or hide) the skills section's contents, and complete the following information:


- Click  to open the Add Skills dialog box:




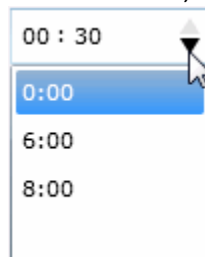
Select one or more skills in the Available items list, and click Add to add the skill(s) to the Selected items list. You can also click Add all to add all skills. To filter the list of skills, type in the filter field above the list. If there are no previously configured skills, there are no entries in list of available items.

5. Click the Effective Skills section expander to display (or hide) the effective skills section's contents:
 - View the skills if any have been assigned, or if the user is a member of an ACD workgroup that has configured skills.

Skill	Proficiency	Desire to use	Inherited from
 Authorization	1	1	 User

 Workgroup Activation affects the User's effective skills. This view assumes the User is currently active on all Workgroups.

6. Click the Statistics section expander to display (or hide) the statistics membership section's contents, and complete the following information:
 - To specify statistic shift start time, use the up and down arrows or type in the text box to set the time, then click  to add the start time:



7. Click the Options section expander to display (or hide) the options section's contents, and complete the following information:

IC Server Manager Administrator Printable Help

- In the ACD Options section:

Agent cost weight: 1.00

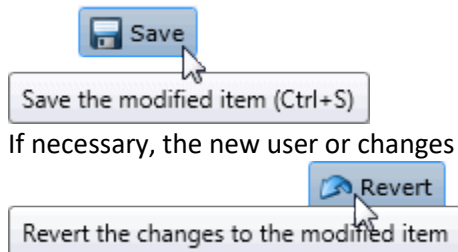
Whisper tone level for workgroup ACD Interactions (dB): -25

Play this greeting at the beginning **A greeting file is required**

Automatically answer ACD Interactions

- Use the slider bar or the up and down arrows to set the Agent Cost Weight.
- Use the slider bar or the up and down arrows to set the Whisper Tone. Select the check box for a greeting to be played for ACD interactions. If selected, an ACD greeting file must be entered (as shown). Select the check box for ACD interactions to be automatically answered.

8. Save the new user or modified user.



If necessary, the new user or changes made to an existing user can be reverted.

Related Topics

[User: General](#)

[User: Licensing](#)

[User: Administrative Rights](#)

[User: Access Control Rights](#)

[User: Security Rights](#)

[User: Personal Information](#)

[User: Advanced](#)

User: ACD Field Descriptions

This topic contains the descriptions for each field in the ACD details view under the View Users page.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

For ACD applications that use skills based call routing, you can configure each ACD user with skills and attributes. Each skill associated with a user is described in terms of that user's proficiency in that skill and his or her desire to use that skill. Users can inherit skills defined from each workgroup of which they are members. If a user inherits skills assigned in the workgroup ACD details, you can override the proficiency and desire to use levels of the inherited skills on the user ACD details.

Utilization

Agents can handle multiple phone calls, email messages, callbacks, chats, and other interactions simultaneously and in any combination. Using the ACD Utilization settings, you can configure how much of an agent's attention would be required for each of the interaction types as a percentage.

For example, if, as an administrator, you set the Chat category for an agent to 25%, it would mean that the agent could handle up to four chat events simultaneously. Indicating 100% for an event type would mean that the agent could handle only one such event at a time.

The percentages might vary from agent to agent based on their experience. Agents are available to the extent that the sum of the percentage utilization of all their current interactions is less than or equal to 100.

For example, if an agent is configured so that phone calls are set to 100 percent, chats to 25 percent, and email messages to 10 percent, then the agent could, at any given time, process one phone call, or four chats, or two chats and five email messages, or one chat and seven email messages, and so forth.

These utilization options can be set at the user level by overriding the inherited settings from the ACD workgroup.

Interaction Type

The **Interaction Type** list displays the interaction types assigned to this user, including Callbacks, Calls, Chats, Emails, Generic Objects, or Work Items.

% Utilization

The **% Utilization** list shows the percentage of an agent's attention required for each interaction type. This value is inherited by the workgroup, and can be overridden. See Workgroup ACD for more information.

Max Assignable

The **Max Assignable** list displays the maximum number of interactions allowed for this interaction type. This value is inherited by the workgroup, and can be overridden. See Workgroup ACD for more information.

Note: The utilization options set in user configuration override the workgroup configuration settings.

Effective Utilization

The effective utilization is the union of the actual and inherited values. If there is no ACD workgroup membership that has utilization, and there is no overridden user's utilization, then nothing is displayed.

Skills

You can assign [skills](#) to each agent in addition to any **Inherited Skills** from the workgroup he or she belongs to. The agent's total skill set is the union of **Inherited Skills** plus the agent skills in this list. You can also override the agent's inherited skill's **Proficiency** and **Desire to use** levels.

Proficiency

Proficiency is a positive whole number between 1 and 100. The higher the number, the greater the skill level. The default value is 1.

Desire to Use

Desire to Use is a number between 0 and 100. The higher the number, the greater the level of desire the agent has to use this skill. For example, an agent may have a high level of proficiency with a particular skill (such as, DOS technical support) but may have very little desire to use that skill in an ACD support environment. The default value is 1.

Effective Skills

The effective skills are the union of the inherited skills and skill set on the user. If there are no ACD workgroup memberships that have skills, and there are no overridden user's skills, then nothing is displayed. If there is ACD workgroup membership that has skills, but the user's membership is not active, then nothing is displayed.

Statistics Shift Start Times

This list of times determines the beginning time and duration of each shift for this user. These times are used to define (relative to the current time) the "current shift" and the "previous shift" on the Queues view in Interaction Supervisor. The default statistic shift is a 24 hour shift starting at midnight (0:00), meaning the statistics are relative to one day (or 24 hours).

Options

The ACD options include:

Agent cost weight

This is a positive number from 1 to 100 that defines the cost attribute for this user. The higher the cost number, the more expensive this user appears to the IC's ACD processing. If you want to consider employee cost when distributing ACD calls, assign a cost to each ACD user according to their relative expense in the company or group. The default cost is 1.

Note: Analogous changes must be made in the ACDProcessCall tool to increase the weight for cost.

Whisper tone level for workgroup ACD Interactions (dB)

When an interaction alerts on a user's queue, you can play a tone, a wave file, or both to inform the user about the incoming interaction. These are called "whisper tones". This is useful if you are using auto-answer (see 'automatically answer' below), but want to warn a user that another interaction is about to connect to his or her queue. The default decibel level is -25.

Play this greeting at the beginning of every ACD Interaction

Select this check box to activate the user's greeting ("smile") prompt played for callers at the beginning of every ACD call to this user. If selected, you must enter the greeting file name. Enter a .wav file (for example, \\ICServer\IC\Resources\AgentGreeting_MarkM.wav).

Automatically answer ACD Interactions

Select this check box if you want CIC to automatically connect ACD interactions to this user's phone.

Note: When an interaction alerts on a user's queue, you can use the Alert tool in Interaction Designer to play a tone, a wave file, or both to inform the user about the incoming interaction. (See 'whisper tone' above.) This is useful if you are using auto-answer but want to warn a user that another interaction is about to connect to his or her queue. If this box is selected, the user must be

at the station to be automatically connected to an interaction. If not selected, when the user's phone rings, he or she must manually click the Pickup button (in CIC clients) or pick up the handset to answer the interaction.

Related Topics

[User: ACD](#)

[User: General Field Descriptions](#)

[User: Licensing Field Descriptions](#)

[User: Administrative Rights Field Descriptions](#)

[User: Access Control Rights Field Descriptions](#)

[User: Security Rights Field Descriptions](#)

[User: Personal Information Field Descriptions](#)

[User: Advanced Field Descriptions](#)

User: Licensing

The Licensing details tab contains allocation method, and basic and additional licensing configuration. Click the name of the details tab for field descriptions.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see [About the Enhanced Interaction Administrator Change Log](#).

To complete the user's licensing information:

1. Click the [Licensing](#) detail tab to display the details view.
 - Click the radio box then select the **License Allocation Method**.
2. Click the Basic Licensing section expander to display (or hide) the basic licensing section's contents, and complete the following information:

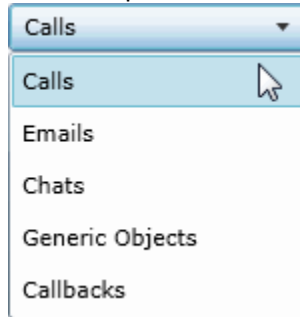
Note: The options available depend on the licensed features. For more information about licenses, see the *PureConnect Licensing Technical Reference* in the PureConnect Documentation Library.

- Select the check box to assign a CIC client access license.
- Click the check box to assign an ACD Access license, and select the associated ACD Access license type from the drop-down box.

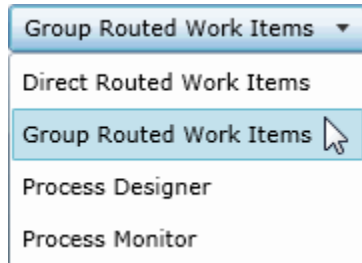
The image shows a drop-down menu with the following options: Media 2, Media 1, Media 2, and Media 3 Plus. The second 'Media 2' option is currently selected and highlighted with a mouse cursor.

IC Server Manager Administrator Printable Help

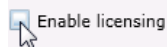
- The access type you select determines the number of interaction types you must specify in the drop-down boxes.




- Click the check box to assign an Interaction Process automation access license, and select the license from the drop-down box.



- Select the check box to enable licensing. The licensing assigned impacts the licensing usage count.



 The licenses assigned here will not be enabled and will not impact the license usage count.


3. Click the Additional Licensing section expander to display (or hide) the additional licensing section's contents, and complete the following information:

Note: The options available depend on the licensed features. For more information about licenses, see the *PureConnect Licensing Technical Reference* in the PureConnect Documentation Library.

- To display all of the licenses available, select <ALL> from the **Enabled** drop-down box. Selecting **No** displays licenses that are not enabled for the user, and selecting **Yes** displays licenses that are enabled for the user. A check mark indicates an enabled

license.

- Interaction Dialer Add-On
- Interaction Feedback Access
- Interaction Optimizer Access
- Interaction Optimizer Access Real Time Adherence
- Interaction Optimizer Schedulable
- Interaction Optimizer Show Real Time Adherence
- Interaction Recorder Access
- Interaction Recorder Client Access
- Interaction Recorder Extreme Query
- Interaction Recorder Quality Monitoring
- Interaction Scripter
- Interaction Supervisor Plug-In: Historical Reporting

- To filter the license list, click  and select the filter type to apply to the license list and type into the license name text box.

Contains

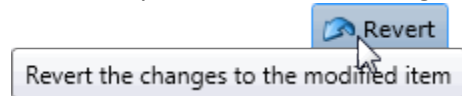
Starts with

Matches whole word

4. Save the new user or modified user.



If necessary, the new user or changes made to an existing user can be reverted.



Related Topics

[User: General](#)

[User: ACD](#)

[User: Administrative Rights](#)

[User: Access Control Rights](#)

[User: Security Rights](#)

[User: Personal Information](#)

[User: Advanced](#)

User: Licensing Field Descriptions

This topic contains the descriptions for each field in the Licensing details view under the View Users page.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

License Allocation Method

Click the type of license allocation to use for this user. By default, **Assignable** method is used.

The **Assignable** method provides a way to allocate licenses to users, workgroups and stations, with the exception of a Basic Station license. The Basic Station license can only be allocated to stations.

The **Concurrent** method provides a way to allocate licenses to users only and is based on the number of simultaneous users accessing a feature or function. This license method allows users to acquire available licenses during logon instead of based on configuration. With the concurrent license method, the license is not allocated until the user logs in to the application. CIC maintains a list of users, and licenses available and in use.

Basic Licensing

The basic licensing section includes:

Interaction Client Access

This license allows the user the client functionality of the CIC clients. Without this license assignment, the user cannot run a CIC client. By default this license is assigned.

ACD Access

This license allows the user ACD access to interactions of a specific types). These are the available types of ACD licenses:

- **Media 1:** This license allows 1 interaction type at a given time.
- **Media 2:** This license allows 2 interaction types at a given time.
- **Media 3 Plus:** This license allows 3 or more interaction types at a given time.

If **Media 1** or **Media 2** type of ACD licenses is selected, you can click **Interaction Types** and select the type of interaction from the list to apply to the license. **Interaction Types** is not available if **Media 3 Plus** is selected, because all types are included.

Notes: Failure to have a ACD Access License assigned to the user will prevent that user from being ACD active.

If the station (Station A) is assigned a Basic Station license and two different users (User A and User B) each have all other necessary rights (i.e., Client Access) assigned to them, then both users can simultaneously login to that station, (User A and User B can both be logged into Station A at the same time). If the second user to login does not have the necessary licenses assigned, then the second user login will fail.

Interaction Process Automation License

Select the **Interaction Process Automation** check box if this user is an Interaction Process Automation user, and then select the type of license to assign to that user.

These are the available types of Interaction Process Automation licenses:

- **Direct Routed Work Items** (I3_ACCESS_IPA_USER) license: Enables you to launch any process to which you have rights. It also enables you to receive Work Items that are directly routed to you.
- **Group Routed Work Items** (I3_ACCESS_IPA_USER_ACD) license: Enables you to receive Work Items that are either routed to you directly or as a member of a workgroup (similar to an ACD queue).
- **Process Designer** (I3_ACCESS_IPA_DESIGNER) license: Enables you to use the Process Designer to create and modify Interaction Process Automation processes.
- **Process Monitor** (I3_ACCESS_IPA_MONITOR) license: Enables you to view process status and details in the Process Monitor or to use Process Reporting in IC Business Manager Applications.

Note: Each license in this list enables you to **use the Interaction Process Automation features included in all the previous licenses in the list.** That is, the Group Routed Work Items license includes the Direct Routed Work Items license. The Process Monitor license includes both of the Routed Work Items licenses. The Process Designer license includes all the other licenses. For more information about designing processes, see the *Interaction Process Automation Technical Reference* and the Process Designer help.

Enable Licenses

Select this check box to set the license settings to Active. If unchecked, the licenses settings on this page are ignored by the system. This is a way to turn off licensing for a user, but keep the license settings.

Additional Licenses

This list displays additional licenses that are available. Select the licenses you wish to assign to this user.

Click **OK** to save your changes. These license assignments are immediately reflected in the license counts in the **Licenses Allocation** container list.

Related Topics

[User: Licensing](#)

[User: General Field Descriptions](#)

[User: ACD Field Descriptions](#)

[User: Administrative Rights Field Descriptions](#)

[User: Access Control Rights Field Descriptions](#)

[User: Security Rights Field Descriptions](#)

[User: Personal Information Field Descriptions](#)

[User: Advanced Field Descriptions](#)

User: Administrative Rights

The Administrative Rights details tab contains configuration of rights to access administrative areas. These options allow access to a subset of rights available with the Master Administrator right. These rights control what objects are shown and what objects can be edited in Interaction Administrator. The access can be set at the default user, role, user or workgroup level. Click the name of the details tab for field descriptions.

Note: Administrative, access control and security rights can be inherited from the default user, roles, and workgroups. See Rights Inheritance for more information.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

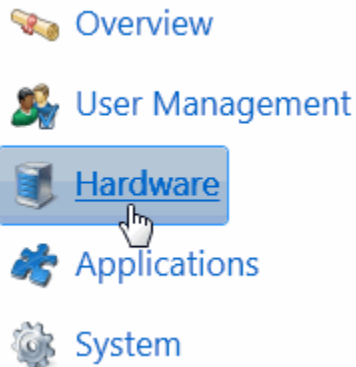
To complete the user's administrative rights information:

1. Click the [Administrative Rights](#) detail tab to display the details view.
2. Click **Browse for more rights**.
Andrew Johnson is not assigned any administrator access rights.

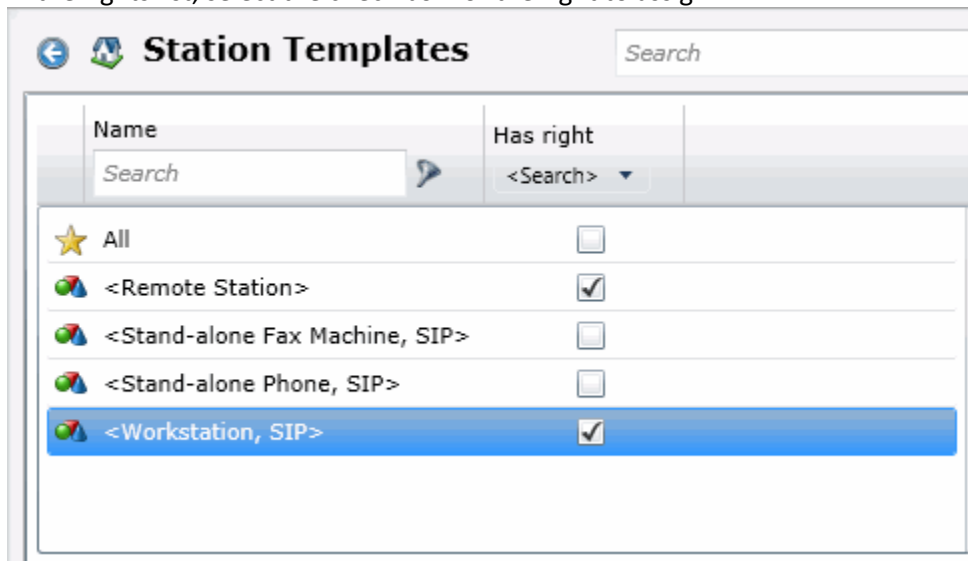
[Browse for more rights](#)




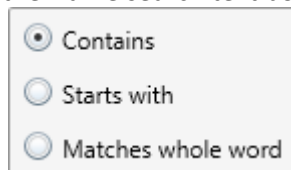
3. Click a rights category to expand the list of specific rights:





4. In the rights list, select the check box for the right to assign.

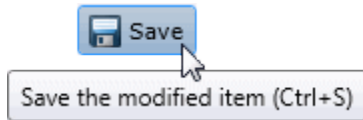


- To filter the rights list, click  and select the filter type to apply to the list and type into the Name search text box.

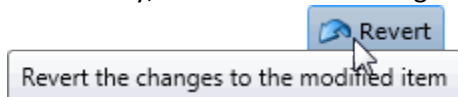


- To display the rights assigned select **Yes** from the **Has right** drop-down box. Selecting **No** displays rights that are not assigned to the user.
- Use the  button to return to the previous detail view, or click  to go to the Home category list.

5. Save the new user or modified user.



If necessary, the new user or changes made to an existing user can be reverted.



Example

If an administrator user needs administrative access to add a new action, do the following:

1. Click **User Management** in the **Category** list.
2. Click **Actions**.
3. Click **View Rights**.
4. Select the *[All] check box to enable the user to edit all actions in the Actions configuration.
5. Click **Save**.

To assign the same rights to the default user, role, or workgroup, follow the same procedure.

Related Topics

[User: General](#)

[User: ACD](#)

[User: Licensing](#)

[User: Access Control Rights](#)

[User: Security Rights](#)

[User: Personal Information](#)

[User: Advanced](#)

User: Administrative Rights Field Descriptions

This topic contains the descriptions for each administrative right in each category in the Administrative details view under the View Users master view.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see [About the Enhanced Interaction Administrator Change Log](#).

The Home page of the Administrative rights includes the following categories:

- Overview (all administrative rights)

IC Server Manager Administrator Printable Help

- [User Management](#)
- [Hardware](#)
- [Applications](#)
- [System](#)
- [Collective](#)

The following tables show the available administrator rights groups and the associated descriptions, by category:

User Management Category	
Group	Description
Account Codes	Determines if account codes can be edited.
Actions	Determines if actions configuration can be edited.
Client Buttons	Determines if CIC client buttons can be edited.
Client Configuration	Determines if CIC client configuration can be edited.
Client Configuration Templates	Determines if CIC client configuration templates can be edited.
Default User	Determines if the default user can be edited.
Password Policies	Determines if password policies can be edited.
Password Policies Configuration	Determines if password policy configuration can be edited.
Queue Columns	Determines if queue columns can be edited.
Response Management	Determines if response management configuration can be edited.
Roles	Determines if roles can be edited.
Schedules	Determines if schedules configuration can be edited.
Secure Input Forms	Determines if secure input forms configuration can be edited
Skills	Determines if skills can be edited.
Status Messages	Determines if status message configuration can be edited.
Users	Determines if users can be edited.
Wrap-up Codes	Determines if wrap-up codes can be edited.
Wrap-up Categories	Determines if wrap-up categories can be edited.
Workgroups	Determines if workgroups can be edited.
Hardware Category	
Group	Description

Hardware Category	
Default Station	Determines if default station configuration can be edited.
Stations	Determines if station configuration can be edited.
Station Groups	Determines if station group configuration can be edited.
Station Templates	Determines if station template configuration can be edited.
Default IP Phone	Determines if default IP phone configuration can be edited.
IP Phones	Determines if IP phone configuration can be edited.
IP Phone Registration Groups	Determines if IP phone registration group configuration can be edited.
IP Phone Templates	Determines if IP phone template configuration can be edited.
IP Phone Ring Sets	Determines if IP phone ring set configuration can be edited.
Applications Category	
Group	Description
Interaction Feedback	Determines if Interaction Feedback configuration can be edited.
Interaction Process Automation	Determines if Interaction Process Automation configuration can be edited.
Interaction Conference	Determines if Interaction Conference configuration can be edited.
Interaction Conference Rooms	Determines if Interaction Conference Rooms configuration can be edited.
Interaction Optimizer Activity Types	Determines if activity types configuration can be edited.
Interaction Optimizer Advanced Configuration	Determines if advanced configuration can be edited.
Interaction Optimizer Agents	Determines if agent configuration can be edited.
Interaction Optimizer Day Classifications	Determines if day classification configuration can be edited.
Interaction Optimizer Forecasts and Schedules	Determines if forecasts and schedules configuration can be edited.
Interaction Optimizer Scheduling Units	Determines if scheduling unit configuration can be edited.
Interaction Dialer Call Lists	Determines if Dialer call list configuration can be edited.
Interaction Dialer Campaigns	Determines if Dialer campaigns configuration can be edited.
Interaction Dialer Configuration	Determines if Dialer configuration can be edited.

Applications Category	
Interaction Dialer Policy Sets	Determines if Dialer policy sets configuration can be edited.
Interaction Dialer Rule Sets	Determines if Dialer rule sets configuration can be edited.
Interaction Dialer Schedules	Determines if Dialer schedules configuration can be edited.
Interaction Dialer Scripts	Determines if Dialer scripts configuration can be edited.
Interaction Dialer Skill Sets	Determines if Dialer skill sets configuration can be edited.
Interaction Dialer Stage Sets	Determines if Dialer stage sets configuration can be edited.
Interaction Dialer Zone Sets	Determines if Dialer zone sets configuration can be edited.
Interaction Analyzer Keyword Sets	Determines which Interaction Analyzer Keyword Sets can be edited.
Interaction Recorder	Determines if Interaction Recorder configuration can be edited.
Interaction Tracker	Determines if Interaction Tracker configuration can be edited.
System Category	
Group	Description
Accumulators	Determines if accumulator configuration can be edited.
Audio Sources	Determines if audio source configuration can be edited.
Contact Data Manager	Determines if contact data manager configuration can be edited.
Contact List Sources	Determines if contact list source configuration can be edited.
Default Location	Determines if default location configuration can be edited.
e-FAQ	Determines if e-FAQ configuration can be edited.
Fax	Determines if fax configuration can be edited.
Fax Groups	Determines if fax groups configuration can be edited.
Handlers	Determines if handler configuration can be edited.
Historical Reports	Determines if historical reports configuration can be edited.
IC Data Sources	Determines if CIC data source configuration can be edited.
Initialization Functions	Determines if initialization configuration can be edited.
Interaction Processor Tables	Determines if Interaction Processor tables can be edited.
License Allocation	Determines if license allocation configuration can be edited.
Lines	Determines if line configuration can be edited.
Line Groups	Determines if line group configuration can be edited.
Locations	Determines if location configuration can be edited.

System Category	
Log Retrieval Assistant	Determines if log retrieval assistant configuration can be edited.
Lync	Determines if Lync configuration can be edited.
MRCP	Determines if MRCP configuration can be edited.
Mail	Determines if mail configuration can be edited.
Media Servers	Determines if media servers configuration can be edited.
Lync Active Directories	Determines if Lync Active Directories configuration can be edited.
Lync Status Messages	Determines if Lync Status Messages configuration can be edited.
Paging Carriers	Determines if paging carrier configuration can be edited.
Phone Numbers	Determines if SIP Proxies configuration can be edited.
Report Logs	Determines if report logs configuration can be edited.
Servers	Determines if server configuration can be edited.
Server Parameters	Determines if server parameter configuration can be edited.
Session Managers	Determines if session managers configuration can be edited.
SIP Proxies	Determines if SIP proxies configuration can be edited.
SMS	Determines if SMS configuration can be edited.
SMS Broker	Determines if SMS broker configuration can be edited.
Speech Recognition	Determines if speech recognition configuration can be edited.
Structured Parameters	Determines if structured parameter configuration can be edited.
System	Determines if system configuration can be edited.
System Parameters	Determines if system parameter configuration can be edited.
Voice Modules	Determines if voice module configuration can be edited.
Web Services Parameters	Determines if web service parameter configuration can be edited.
Collective Category	
Group	Description
Collective	Determines if the home site can be edited.
Peer Sites	Determines if the peer sites can be edited

Related Topics[User: Administrative Rights](#)[User: General Field Descriptions](#)[User: ACD Field Descriptions](#)

[User: Licensing Field Descriptions](#)

[User: Access Control Rights Field Descriptions](#)

[User: Security Rights Field Descriptions](#)

[User: Personal Information Field Descriptions](#)

[User: Advanced Field Descriptions](#)

User: Access Control Rights


The Access Control Rights details tab contains configuration of rights to access administrative areas. These rights determine which items can be viewed and which ones can be modified (for example, view user queues or give rights to view user queues). These rights can be set at the default user, role, user or workgroup level. Click the name of the details tab for field descriptions.

Notes:

- Administrative, access control and security rights can be inherited from the default user, roles, and workgroups. For more information, see Rights Inheritance.
- If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

To complete the user's access control rights information:

1. Click the [Access Control Rights](#) detail tab to display the details view.
2. Click **Browse for more rights**.


 **Access Control Rights Overview for Andrew Johnson**
This is an overview of the effective access control rights for Andrew Johnson. Effective rights consist of rights that are set on Andrew Johnson and rights that are inherited.
[Browse for more rights](#)

The above example shows what is displayed if access control rights are already assigned. This differs if the user does not have access control rights.

3. Click a rights category to expand the list of specific rights:

 [Overview](#)

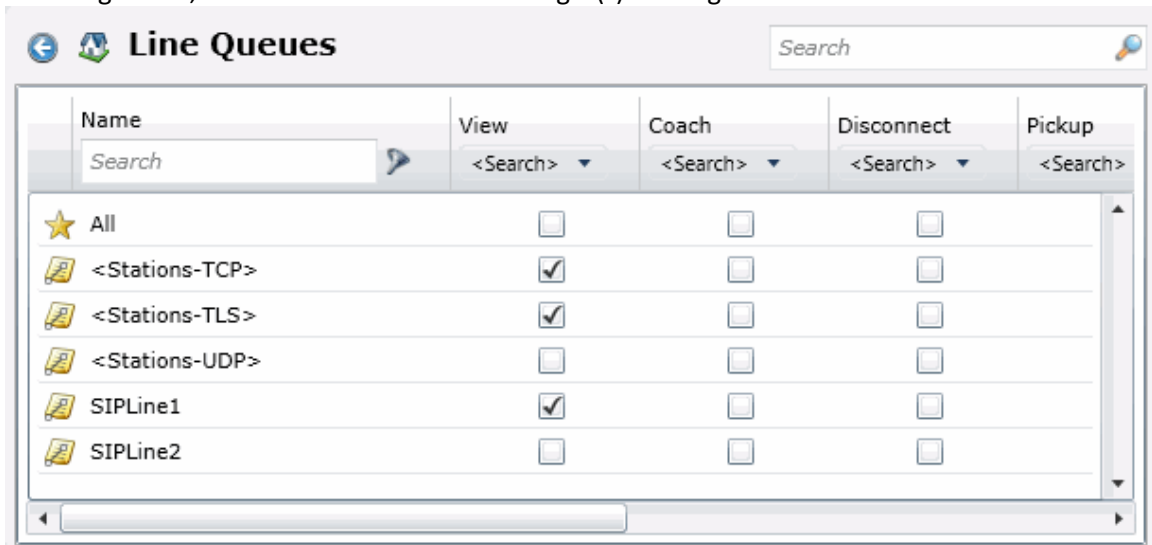
 [User Management](#)

 [Queues](#)

 [Hardware](#)

 [Applications](#)

4. In the rights list, select the check box for the right(s) to assign.

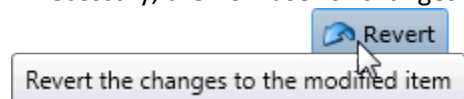


- To filter the rights list, click and select the filter type to apply to the list and type into the Name search text box.
 - Contains
 - Starts with
 - Matches whole word
- To display the rights assigned select **Yes** from the **Has right** drop-down box. Selecting **No** displays rights that are not assigned to the user.
- Use the button to return to the previous detail view, or click to go to the Home category list.

5. Save the new user or modified user.



If necessary, the new user or changes made to an existing user can be reverted.



Related Topics

[User: General](#)

[User: ACD](#)

[User: Licensing](#)

[User: Administrative Rights](#)

[User: Security Rights](#)

[User: Personal Information](#)

[User: Advanced](#)

User: Access Control Rights Field Descriptions

This topic contains the descriptions for each access control right in each category in the Access Control Rights details view under the View Users master view.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

The Home page of the Administrative rights includes the following categories:

- Overview (all access control rights)
- [User Management](#)
- [Queues](#)
- [Hardware](#)
- [Applications](#)
- [Interaction Attendant Profiles](#)
- [System](#)

The following tables show the available administrator access control groups and the associated descriptions, by category:

User Management Category		
Group	Name	Description
Account Codes	View	Determines which account codes can be viewed in the CIC client dialog boxes. To assign account codes to incoming and outgoing calls the Account Code Verification security right must be assigned in addition to this access control right.
Client Buttons	View	Determines which custom buttons can be viewed on the Queue Control toolbar in the CIC client.
Directory Status Columns	View	Determines which status columns can be added to a directory view. These status columns include: Activated, Forward Number, Logged In, Notes, On Phone, Status, Status Summary, Time in Status, and Until.
Queue Columns	View	Determines which various queue columns in user, station, orbit or workgroup queues can be viewed.
Skills	View	Determines which IPA skills can be viewed and filtered in Process Designer.
Users	Change Status	Determines which users' status can be changed.
	View History	Determines which users' status history can be viewed.

Workgroups	View	Determines which workgroup directories can be viewed.
	View Statistics	CIC clients: View workgroups in the Workgroup Statistics view. Interaction Supervisor: View and select workgroup statistics.
Queues Category		
Group	Name	Description
Line Queues	View	Determines which line queues can be viewed.
	Coach	Determines which line queue's interactions can be coached.
	Disconnect	Determines which line queue's interactions can be disconnected.
	Pickup	Determines which line queue's interactions can be picked up.
	Transfer	Determines which line queue's interactions can be transfer.
	Join	Determines which line queue's interactions can be joined.
	Listen	Determines which line queue's interactions can be listened.
	Record	Determines which line queue's interactions can be recorded.
Station Queues	View	Determines which station queues interactions can be viewed.
	Search	Determines which station queues can be transfer targets in the Transfer dialog box.
	Disconnect	Determines which station queue's interactions can be disconnected.
	Hold	Determines which station queue's interactions can be held.
	Mute	Determines which station queue's interactions can be muted.
	Pickup	Determines which station queue's interactions can be picked up.

IC Server Manager Administrator Printable Help

	Transfer	Determines which station queue's interactions can be transferred.
	Coach	Determines which station queue's interactions can be coached.
	Join	Determines which station queue's interactions can be joined.
	Listen	Determines which station queue's interactions can be listened.
	Record	Determines which station queue's interactions can be recorded.
User Queues	View	Determines which user queues can be viewed.
	Statistics	Determines which user queues' statistics can be viewed.
	Disconnect	Determines which user queue's interactions can be disconnected.
	Hold	Determines which user queue's interactions can be held.
	Mute	Determines which user queue's interactions can be muted.
	Pickup	Determines which user queue's interactions can be picked up.
	Transfer	Determines which user queue's interactions can be transferred.
	Coach	Determines which user queue's interactions can be coached.
	Join	Determines which user queue's interactions can be joined.
	Listen	Determines which user queue's interactions can be listened.
	Record	Determines which user queue's interactions can be recorded.
Workgroup Queues	View	<p>Determines which workgroup queues can be viewed.</p> <p>Note: The View Workgroup Queue rights are used as a filter for which workgroups are exposed to a user, when the user is using the Telephone User Interface (TUI) to send or forward voice mail and email messages.</p>

	Search	Determines which workgroup queues can be transfer targets in the Transfer dialog box.
	Activate Others	Determines which workgroup queue's members can activate themselves.
	Activate Self	Determines which workgroup queue's members can activate others.
	Disconnect	Determines which workgroup queue's interactions can be disconnected.
	Pickup	Determines which workgroup queue's interactions can be picked up.
	Transfer	Determines which workgroup queue's interactions can be transferred
	Coach	Determines which workgroup queue's interactions can be coached.
	Join	Determines which workgroup queue's interactions can be joined.
	Listen	Determines which workgroup queue's interactions can be listen.
	Record	Determines which workgroup queue's interactions can be recorded.

Hardware Category

Group	Name	Description
Stations	Login	Determines which stations can be logged in.
Station Groups	View	Determines which station groups can be viewed.
	Search	Determines which station groups can be transfer targets in the Transfer dialog box.

Application Category

Group	Name	Description
Interaction Feedback Surveys	View	Determines which Interaction Feedback surveys can be viewed.
	Modify	Determines which Interaction Feedback surveys can be modified.
	View	Determines what processes in Process Monitor and Interaction Desktop can be searched for and viewed.

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Interaction Process Automation Processes	Manage	Determines which processed can be searched, canceled, and retried in Process Monitor.
	Launch	Determines which processes can be launched in Interaction Desktop. Note: A process must be published before it can be launched.
Interaction Optimizer	Manage	Determines if the Interaction Optimizer Administration Module in the Interaction Center Business Manager (ICBM) application is accessible.
Interaction Optimizer Scheduling Units	view	Determines which Optimizer scheduling units can be viewed.
Interaction Conference Rooms	View	Determines if a conference room is available for creating conferences. Conference rooms (defined telephone phone numbers/stations for use in Interaction Conference) can be restricted without this right. Without this right, users can still call into the room if they have a pin, but they can't make conferences that use it. By default, everyone who has access to Interaction Conference can use every room defined in CIC.
Interaction Dialer Campaigns	View	Determines which campaigns can be viewed.
	Modify	Determines which campaigns can be modified.
	View Automatic Time Zone Mapping	Determines which campaign time zone configuration can be viewed.
	Modify automatic Time Zone Mapping	Determines which campaign time zone configuration can be modified.
	View Agentless Calling Mode	Determines which campaign calling mode configuration can be viewed.
	Modify Agentless Calling Mode	Determines which campaign calling mode configuration can be modified.

	View Line Settings	Determines which campaign line setting configuration can be viewed.
	Modify Line Settings	Determines which campaign line setting configuration can be modified.
	View Max Lines Per Campaign	Determines if the maximum number of campaign lines can be viewed.
	Modify Max Lines Per Campaign	Determines if the maximum number of campaign lines can be modified.
	View Statuses	Determines which campaign statuses can be viewed.
	Modify Statuses	Determines which campaign statuses can be modified.
Interaction Dialer Rule Sets	View Custom Handler	Determines which rule actions custom handlers can be viewed.
	Modify Custom Handler	Determines which rule actions custom handlers can be modified.
	View Event Log	Determines which rule actions event logs can be viewed.
	Modify Event Log	Determines which rule actions even logs can be modified.
Interaction Recorder Questionnaires	View	Determines which Questionnaire directories are available from the drop-down list in the Interaction Recorder Questionnaire container. If available from the list, a recording can be scored with that Questionnaire.
	Modify	Determines which Questionnaires can be modified.
Interaction Attendant Profiles Category		
Group	Name	Description
Interaction Attendant Email Profiles	View	Determines which Interaction Attendant email profiles can be viewed. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Search	Determines which Interaction Attendant email profiles are available in the "Transfer to" dialog box. Users who can view a profile have a lock on the

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		profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Modify	Determines which Interaction Attendant email profiles can be modified. Users who can modify a profile can acquire a lock and edit/publish it.
Interaction Attendant Inbound Profiles	View	Determines which Interaction Attendant inbound profiles can be viewed. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Search	Determines which Interaction Attendant inbound profiles are available in the "Transfer to" dialog box. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Modify	Determines which Interaction Attendant inbound profiles can be modified. Users who can modify a profile can acquire a lock and edit/publish it.
Interaction Attendant Operator Profiles	View	Determines which Interaction Attendant operator profiles can be viewed. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Search	Determines which Interaction Attendant operator profiles are available in the "Transfer to" dialog box. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Modify	Determines which Interaction Attendant operator profiles can be modified. Users who can modify a profile can acquire a lock and edit/publish it.
Interaction Attendant Outbound Profiles	View	Determines which Interaction Attendant outbound profiles can be viewed. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Search	Determines which Interaction Attendant outbound profiles are available in the "Transfer to" dialog box. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Modify	Determines which Interaction Attendant outbound profiles can be modified. Users who can modify a profile can acquire a lock and edit/publish it.

System Category		
Group	Name	Description
General Directories	View	Determines which general directories can viewed.
IC Data Sources	View	Determines which data sources the user can configure and reference in database actions in Interaction Process Automation.
Interaction Reporter Reports	View	Determines which Interaction Reporter reports can be generated.
Layouts	View	Determines which layouts the user can view.
Misc Items	View	Allows a user to log in on behalf of another user.
Phone Number - Classifications	View	Determines which phone number classifications can be accessed, such as Blocked or Long Distance.
	Follow-me	Determines which phone number classifications can be used as follow-me numbers.
	Forward	Determines which phone number classifications can be used as forwarding numbers.
	TUI	Determines which phone number classifications can be used as forward numbers available through the menu when logged into voice mail. This access right prevents toll-fraud through the TUI.
Plug-ins	View	Determines which plug-ins can be added.
Positions	View	Determines which floor plan images (positions) the user can use in Interaction Supervisor iPad Edition.
Response Management	View	Allows access to chat features.
Status Messages	View	Determines which statuses can be selected from the My Status drop-down list or from the Set Status list when changing another user's status.
e-FAQs	View	Determines if e-FAQ configuration can be viewed.

Related Topics

[User: Access Control Rights](#)

[User: General Field Descriptions](#)

[User: ACD Field Descriptions](#)

[User: Licensing Field Descriptions](#)

[User: Administrative Rights Field Descriptions](#)

User: Security Rights

The Security Rights details tab contains configuration of rights to manage CIC client application functionality, such as buttons for recording, listening, and coaching. These rights can be set at the default user, role, user or workgroup level. Click the name of the details tab for field descriptions.

Notes:

- Administrative, access control and security rights can be inherited from the default user, roles, and workgroups. See Rights Inheritance for more information.
- If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

To complete the user's security rights information:

1. Click the [Security Rights](#) detail tab to display the details view.
2. Click **Browse for more rights**.



Security Rights Overview for Andrew Johnson

This is an overview of the effective security rights for Andrew Johnson. Effective rights consist of rights that are set on Andrew Johnson and rights that are inherited.

[Browse for more rights](#)











The above example shows what is displayed if security rights are already assigned. This differs if the user does not have security rights.

3. Click a rights category to expand the list of specific rights:



4. In the rights list, select the check box for the right to assign.



Name	Has right
<input type="text" value="Search"/>	<Search>
 Account code verification	<input type="checkbox"/>
 Can create speed dials	<input type="checkbox"/>
 Conference calls	<input type="checkbox"/>
 Customize client	<input type="checkbox"/>
 Monitor columns	Inherited
 Multiple calls	Inherited
 Orbit queue	<input type="checkbox"/>

- To filter the rights list, click  and select the filter type to apply to the list and type into the Name search text box.

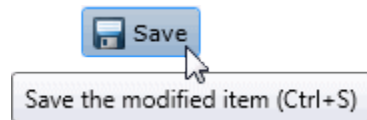
Contains

Starts with

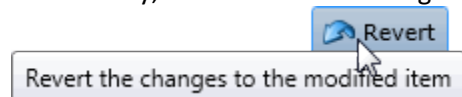
Matches whole word

- To display the rights assigned select **Yes** from the **Has right** drop-down box. Selecting **No** displays rights that are not assigned to the user.
- Use the  button to return to the previous detail view, or click  to go to the Home category list.

5. Save the new user or modified user.



If necessary, the new user or changes made to an existing user can be reverted.



Related Topics

- [User: General](#)
- [User: ACD](#)
- [User: Licensing](#)
- [User: Administrative Rights](#)
- [User: Access Control Rights](#)
- [User: Personal Information](#)
- [User: Advanced](#)

User: Security Rights Field Descriptions

This topic contains the descriptions for each security right in each category in the Security Rights details view under the View Users master view.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

The Home page of the Administrative rights includes the following categories:

- Overview (all security rights)
- [User Management](#)
- [Applications](#)

The following tables show the available security rights groups and the associated descriptions, by category:

User Management Category		
Group	Name	Description
Interaction Client	Account Code Verification	Allows users to assign account codes to incoming and outgoing interactions. See also the View Account Codes access control right.
	Can Create Speed Dials	Allows users to create speed dial views.
	Client Templates	Allows users to create and edit configuration templates for the CIC clients.
	Conference Calls	Allows users to create conference calls. See also the Conference Rooms access control right.
	Customize Client	Allows users to customize configuration settings in the CIC clients. It also allows users to add view, however, the ability to display certain views may require additional access control rights.
	Monitor Columns	Allows users to add the Lstns column and Recs column to a queue view. The Lstns column shows a speaker icon when someone is listening to the conversation. The Recs column shows a red dot icon to indicate that the conversation is being recorded.
	Multiple Calls	Determines whether or not users are alerted when a new call arrives in the queue when already on a call. This only occurs on calls into lines that are marked "Allow Deferred Answer." If users do not have this right, or are already on a call and do not have call coverage set to forward

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	<p>calls when busy, then they are not alerted to the new call and it rolls to voice mail.</p> <p>This setting does not actually prevent multiple calls from being on a queue at the same time. It merely controls whether users are alerted or not. This setting applies only to My Interactions, not to calls to a logged-in station or default workstation.</p>
Orbit Queue	Allows users to park a call on orbit.
Persistent Connections	<p>Allows users the option of keeping remote telephone connected until you log off.</p> <p>Allows users to select Allow Persistent Connection when using a dynamic remote CIC client connection.</p>
Personal Rules	Allows users to set up Personal Rules or create a Quick Call rule. These rules automatically perform specific actions when triggered by certain interactions
Problem Reporter	Allows users to use the Problem Reporter option from the File menu in the CIC clients. This option allows users to send an email message containing problem information to a specified email recipient.
Receive voice mail	<p>If users have this right, callers are sent to voice mail when in a DND status (Gone Home, Out of the Office, or some other "not available" status) or when not answering phone.</p> <p>If users don't have this right, callers are returned to the Interaction Attendant main menu.</p>
Response Management	Allows users to use Response Management to incorporate a stored response such as a standard greeting or their company's support website address in e-mail messages, chats, callback requests, or text message.
Status Notes	Allows users to create a Status Note when they set Status details for themselves or other users. Status Notes provide additional details about status, for example, the date an agent expects to return after vacation.
User-defined Telephone Number on Remote Login	Allows users to enter a new Remote Number when logging in. See Dynamic Remote Client Connections.
Workgroup Statistics	Allows users to enter a new Remote Number when logging in.

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	Workgroups Profiles Tab	Allows users to display the Workgroup and Profiles view. This view lists workgroups and Attendant Profiles by name.
Handlers	Debug	Allows users to debug handlers published to the IC server. This applies only to users who have the Interaction Designer program and who are authorized to update production handlers or create new handlers on the IC telephony server. If this check box is not selected, users who attempt to debug handlers from Interaction Designer will see an appropriate error message.
	Manage	Allows users to add or remove handlers published to the IC server. A handler's status can be managed by someone running the Interaction Designer program on a workstation and using the Manage Handlers command on the Tools menu. If this option is not selected, users who attempt to manage handlers from Interaction Designer will see an appropriate error message.
	Publish	Allows users to publish new or updated handlers on the IC server. This applies only to users who have the Interaction Designer program and who are authorized to update production handlers or create new handlers on the IC telephony server. If this check box is not selected, users who attempt to publish handlers from Interaction Designer will see an appropriate error message.
Interaction Commands - (Restricts which commands are visible in the CIC clients) Note: These rights control the buttons in Interaction Client.	Assistance	Displays the Assistance button.
	Coach	Displays the Coach button.
	Disconnect	Displays the Disconnect button.
	Hold	Displays the Hold button.
	Join	Displays the Join button.
	Listen	Displays the Listen button.
	Mute	Displays the Mute button.
	Park	Displays the Park button.
	Pause	Displays the Pause button.
	Pickup	Displays the Pickup button.
	Private	Displays the Private button.
Record	Displays the Record button.	

	Secure Input	Displays the Secure Input button.
	Secure Recording Pause	Displays the Secure Record button.
	Transfer	Displays the Transfer button.
	Voicemail	Displays the Voicemail button.
My Interactions	Coach Interactions	Allows users to coach interactions by adding themselves to other agents' interactions.
	Disconnect Interactions	Allows users to disconnect interactions using the CIC clients instead of hanging up the telephone.
	Join Interactions	Allows users to join interactions, thus creating a conference call.
	Listen in on Interactions	Allows users to listen to calls. Both sides of a call can be heard.
	Mute Interactions	Allows users to disable the microphone on the telephone so that the other party or parties cannot hear what is being said during a call. It also enables users to reactivate the microphone.
	Park Interactions	Allows users to park calls on orbit. Note: Can only park calls appearing in My Interactions.
	Pause Interactions	Allows users to use the Pause button to control a recording session. The button can be clicked to pause the recording session. It can be clicked again to resume the recording session.
	Pickup Interactions	Allows users to pick up interactions.
	Private Interactions	Allows users to prevent other CIC client users from recording or listening to their conversation.
	Put Interactions on Hold	Allows users to place selected interactions on hold.
	Record Interactions	Allows users to record interactions. The recordings are stored in files.
	Request Assistance from Supervisors	Allows users to request assistance from supervisors.
	Secure Recording Pause Interactions	Allows users to securely pause a recording to avoid recording sensitive information, such as Social Security numbers or credit card numbers, when recording interactions.
	Transfer Interactions	Allows users to transfer interactions.
	Transfer Interactions to Voicemail	Allows users to transfer calls to voice mail.

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Remote Access	Email Access via TUI	Allow users to participate in e-mail interactions through the Telephone User Interface (TUI).
	Fax Access via TUI	Allows users to participate in fax interactions through the Telephone User Interface (TUI).
	Mobile Office User	Allows users access to the Mobile Office feature.
	Outlook TUI User (Requires Mobile Office User)	Allows users access to Microsoft Outlook through the Telephone User Interface (TUI).
	Voicemail Access via TUI	Allows users to participate in voice mail interactions through the Telephone User Interface (TUI).
User	Alert Programming	This right controls whether or not users can add, edit and remove alerts. When this right is assigned, context menus over statistic-based values in Supervisor provide the ability to add, edit and remove alerts. Without this right, users can only view alerts.
	Directory Administrator	Allows users to edit public directories that were created by other users.
	Follow Me	Allows users to call-forward multiple numbers, long distance numbers, and international numbers.
	Intercom Chat	Allows users to have intercom chats between other users on the same IC server.
	IP Phone Provisioning Administrator	Allows users to provision IP phones in the Managed IP Phones container.
	Remote Control	Allows users to remotely run applications and utilities that are Notifier clients, for example, IC System Manager and Switchover Control Panel.
	Require Forced Authorization Code	Requires users logged into station phones to enter a code that authorizes toll number calls.
	TIFF Faxes	Allows users to use TIFF (Tag Image File Format) for faxes.
	Trace Configuration	Allows users to configure tracing using IC System Manager or IC Trace utility.
	Video	Reserved for future use.
View Interaction Details	Allows users to use Interaction Details view in the Interaction Tracker category. This view allows Interaction Supervisor users to search for interactions and examine the details.	

Application Category		
Group	Name	Description
Interaction Reporter	Interaction Reporter administrator	Allows users to configure all features and functions in Interaction Reporter.
Interaction Conference	Create and Modify All Conferences	Allows users to create conferences and to modify <i>all</i> conferences regardless of creator.
	Create and Modify Conferences	Allows users to create conferences, but to modify only those conferences they created.
Interaction Tracker	Add Individuals	Allows users to add individuals in Interaction Tracker Client.
	Add Organizations	Allows users to add organizations in Interaction Tracker Client.
	Delete Individuals	Allows users to delete individuals in Interaction Tracker Client.
	Delete Organization	Allows users to delete organizations in Interaction Tracker Client.
	Execute long-running Queries	Allows users to run more advanced queries against the Interaction Tracker database.
	Have Private Contacts	Allows users to create contacts that cannot be viewed by others.
	Interaction Tracker Administrator	Gives users the rights to access all pages in Interaction Tracker Client.
	Modify Individuals	Allows users to change or update individuals in Interaction Tracker Client.
	Modify Interactions	Allows users to change or update interactions in Interaction Tracker Client.
	Modify Organizations	Allows users to change or update organizations in Interaction Tracker Client.
	Related Interactions Page	Allows users to view the page that shows related interactions in Interaction Tracker Client.
View Other People's Private Interactions	Allows users to view private interactions of other users in Interaction Tracker Client.	
Interaction Dialer	Login Campaign	Allows users to log in to a campaign.
	Modify General	Allows users to modify the general campaign settings page.

View General	Allows users to view the general campaign settings page.
Modify Preview Call Behavior	Allows users to modify the preview call behavior on the miscellaneous campaign configuration page.
View Preview Call Behavior	Allows users to view the preview call behavior on the miscellaneous campaign configuration page.
Modify Outbound Servers	Allows users to modify the outbound server settings on the campaign configuration page.
View Outbound Servers	Allows users to view the outbound server settings on the campaign configuration page.
Modify Change Auditing	Allows users to modify the auditing behavior on the miscellaneous campaign configuration page.
View Change Auditing	Allows users to view the auditing behavior on the miscellaneous campaign configuration page.
Modify Phone Number Types	Allows users to modify the phone number types on the phone number types page in campaign configuration.
View Phone Number Types	Allows users to view the phone number types on the phone number types page in campaign configuration.
Modify HTTP Server	Allows users to modify the campaign server settings.
View HTTP Server	Allows users to view the campaign server settings.
View/Modify Campaign Agentless Calling Type	Determines whether users can select Agentless dialing mode when setting the Calling mode for a Campaign.
View/Modify Campaign Automatic Zone Mapping	Grants right to check "Automatically map time zones and all child options in a Campaign object. Without this right, options are disabled.
View/Modify Line Settings	Set options in the Dialer Line Information group box for a Campaign. These options configure Dialer to adhere strictly to CIC's Dial Plan or to use one specific line group for campaign calls.
View/Modify Campaign Maximum Lines	Determines whether the <i>Maximum Lines per Campaign</i> setting on the Basic Configuration tab of a Campaign is enabled or not.
View/Modify Custom Handler Actions	Grants right to run the Dialer_RuleActionEvent handler by setting up a Rule Action or Policy Behavior. A user who does not have this right

	cannot modify settings that configure a Run Handler rule action.
View/Modify Database Connections	Grants right to view and modify Database Connections in Dialer Manager. When this right is not granted, Database Connection options are disabled.
View/Modify DNC Sources	Grants right to view and modify the DNC Sources view in Dialer Manger. A DNC Source provides a list of telephone numbers that should not be dialed. When this right is not granted, DNC options are disabled.
View/Modify Time Zone Map Data	Grants right to view and modify the Timezone Map Data view in Dialer Manger. A time zone map is a file that associates the initial digits of a phone number (area code and exchange in North America, for example) with a time zone. When this right is not granted, options on the view are disabled.
View/Modify Event Log	Grants right to configure Rule Set Actions or Policy Set Behaviors that write an event log entry.
View/Modify Contact List Data Query	Determines whether or not the Data Query tab of a Contact List object is visible or not. The Data Query tab queries the contact list to display a list of results in a data grid. Query results can be saved as filters. Users may also apply actions to records displayed in the grid, and commit changes back to the database.
View/Modify Campaign Status	Enables the Campaign Execution Panel for a campaign entry. Users who have this right can control the running state of a campaign, whether it runs in accordance with a schedule, or in a manually operated state. Users can also recycle the contact list, recycle the campaign, and test to ensure that campaign settings are valid. When not granted, these controls are disabled.
Lock policy sets	Enables the user to lock a Dialer policy object, which prevents it from being modified, removed, or unlocked by anyone who does not have Master Administrator rights. Once a policy is locked, users who are not Master Administrators can view the policy, but they cannot remove or edit it until a Master Administrator removes the lock. Locked policies can be assigned to a campaign, but they cannot be

		removed from a campaign without Master Administrator rights.
Interaction Optimizer	Allow Agent Preferences	Allows users to set schedule preferences in Interaction Desktop.
	Allow agent to do schedule bidding	Allows user to set or his her schedule preferences in Interaction Desktop.
	Allow agent to see their rank	Allows user to view the ranking of the user's potential schedules in order from most desired to least desired. For example, "Your rank is 22."
	Allow agent to see their relative rank	Allows user to view the relative ranking of the user's potential schedules as compared to other agents' rankings. For example, "Your rank is 22 out of 45 for this bid."
	Delete scheduling units	Allows user to delete scheduling units.
	Create scheduling units	Allows user to add scheduling units.
	Can view Optimizer Day Classifications	Allows user to view day classifications in Optimizer.
	Can modify Optimizer Day Classifications	Allows user to edit day classifications in Optimizer.
	Can create Optimizer Day Classifications	Allows user to add day classifications in Optimizer.
	Can delete Optimizer Day Classifications	Allows user to delete day classifications in Optimizer.
	Can View Activity Codes	Allows user to view activity codes.
	Can Modify Activity Codes	Allows user to edit activity codes.
	Can Delete Activity Codes	Allows user to delete activity codes.
	Can View Activity Type Mapping	Allows user to view activity type mappings.
	Can submit time off	Allows user to request time off.
Interaction Recorder Policy	Create and Delete Questionnaire Directories	Allows users to create or delete questionnaire directories, and also create or delete rankings.
	Policy Editor	Allows users to access Policy Editor in Interaction Recorder Client.
	Override Finished Scorecards	Allows users to modify finished scorecards for questionnaires in questionnaire directories that can be viewed. A scorecard is considered finished

		<p>when "Finish" is clicked on the scoring dialog box. Normally, a finished scorecard cannot be change.</p> <p>Note: Overriding a finished scorecard can affect reports.</p>
Interaction Tracker	Add individuals	Allows user to add individuals in Interaction Tracker.
	Add organizations	Allows user to add organization in Interaction Tracker.
	Delete individuals	Allows user to delete individuals in Interaction Tracker.
	Have private contacts	Allows user to have private contacts in Interaction Tracker.
	Interaction Tracker administrator	Allows user to access and configure all of the features and functions in Interaction Tracker.
	Modify individuals	Allows user to edit individuals in Interaction Tracker.
	Modify interactions	Allows user to edit interactions in Interaction Tracker.
	Modify organizations	Allows user to edit organizations in Interaction Tracker.
	Related Interactions page	Allows user to view the Related Interactions page in Interaction Tracker.
View other people's private Interactions	<p>Allows user to view interactions that other users have designated as "private." The user sees these interaction in the Related Items view and in the Find Interaction dialog box.</p> <p>Users designate interactions as "private" to prevent other users from recording or listening to them.</p>	

Related Topics

[User: Security Rights](#)

[User: General Field Descriptions](#)

[User: ACD Field Descriptions](#)

[User: Licensing Field Descriptions](#)

[User: Administrative Rights Field Descriptions](#)

[User: Access Control Rights Field Descriptions](#)

[User: Personal Information Field Descriptions](#)

User: Personal Information

The Personal Information details tab contains general, home business and contact information associated with the user. The information entered here is displayed in the Company Directory within the CIC clients. Click the name of the details tab for field descriptions.

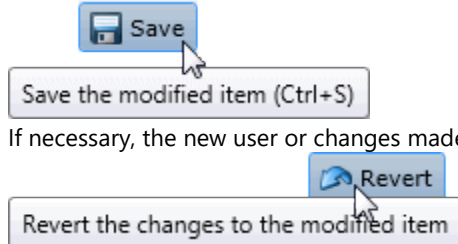
Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see [About the Enhanced Interaction Administrator Change Log](#).

To complete the user's personal information:

1. Click the [Personal Information](#) detail tab to display the details view.
2. Click the General section expander to display (or hide) (or hide) the general section's contents, and complete the following information:
 - Type the user's **First name** and **Last name**.
 - Type the **Company**.
 - Type the **Home phone** and enter an **Extension** if applicable.
 - Type the **Business phone** and enter an **Extension** if applicable. Select the check box to automatically dial the extension.
 Automatically dial extension
3. Click the Home section expander to display (or hide) (or hide) the home section's contents, and complete the following information:
 - Type the user's **Address**.
 - Type the **City**.
 - Type the **State**.
 - Type the **Zip code**.
 - Type the **Country**.
4. Click the Business section expander to display (or hide) (or hide) the business section's contents, and complete the following information:
 - Type the user's business **Title**.
 - Type the **Department**.
 - Type the **Address**.
 - Type the **Assistant**.
 - Type the **Assistant phone** and enter an **Extension** if applicable. Select the check box to automatically dial the extension.
5. Click the Other Contact section expander to display (or hide) the other contact section's contents, and complete the following information:
 - Type the user's **Mobile** number.

- Type the **Pager** number.
- Type the **Fax** number. Enter an **Extension** if applicable, and select the check box to automatically dial the extension for this and the above fields.
- Type the **Business email** and type an **Alias**.
- Type **Notes**.

6. Save the new user or modified user.



If necessary, the new user or changes made to an existing user can be reverted.

Related Topics

[User: General](#)

[User: ACD](#)

[User: Licensing](#)

[User: Administrative Rights](#)

[User: Access Control Rights](#)

[User: Security Rights](#)

[User: Advanced](#)

User: Personal Information Field Descriptions

This topic contains the descriptions for each field in the Personal Information details view under the View Users page.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

General

This information is the basic information about the user.

First Name

This is the user's first name, e.g., "Mike".

Last Name

This is the user's last name, e.g., "Johnson".

Company

This is the user's company name, e.g., "Genesys".

Home Phone

This is the user's home phone number, and extension. If you select **Automatically dial extension**, the CIC client pauses, then dials the extension after the connecting to the phone number.

Business Phone

This is the user's business phone number, and extension. If you select **Automatically dial extension**, the CIC client pauses, then dials the extension after the connecting to the phone number.

Home

This information is the home details about the user.

Address

This is the user's home street address, e.g., "1234 Maple Street".

City

This is the user's home city, e.g., "Indianapolis".

State

This is the user's home state, e.g., "Indiana".

Zip Code

This is the user's home zip code, e.g., "46278".

Country

This is the user's home country, e.g., "USA".

Business

This is business related information about the user.

Title

This is the user's business title, e.g., "Senior Software Engineer".

Department

This is the user's business department, e.g., "Development".

Address

This is the user's business address, e.g., "Indianapolis Headquarters".

Assistant

This is the user's business assistant, e.g., "Justin Jones".

Assistant Phone

This is the user's business assistant's phone number and extension. If you select **Automatically dial extension**, the CIC client pauses, then dials the extension after the connecting to the phone number.

Other

This is various other information about the user.

Mobile

This is the user's mobile phone number and extension. If you select **Automatically dial extension**, the CIC client pauses, then dials the extension after the connecting to the number.

Pager

This is the user's pager number and extension. If you select **Automatically dial extension**, the CIC client pauses, then dials the extension after the connecting to the number.

Fax

This is the user's fax number and extension. If you select **Automatically dial extension**, the CIC client pauses, then dials the extension after the connecting to the number.

Business Email

This is the user's business email address, e.g., "andrewjohnson@ACME.com".

Alias

This is the privacy name for this user and is used for creating an alias for the user in chat windows and other displays.

Notes

Use this field to enter any comments or other information that could be beneficial in knowing about this user.

Related Topics

[User: Personal Information](#)

[User: General Field Descriptions](#)

[User: ACD Field Descriptions](#)

[User: Licensing Field Descriptions](#)

[User: Administrative Rights Field Descriptions](#)

[User: Access Control Rights Field Descriptions](#)

[User: Security Rights Field Descriptions](#)

[User: Advanced Field Descriptions](#)

User: Advanced

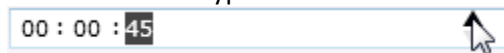
The Advanced tab information for non-ACD actions, parked interactions, phonetic spellings, message waiting indicator (MWI), client configuration templates, custom attributes, and history. Click the name of the details tab for field descriptions.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

To complete the users' advanced information:

1. Click the [Advanced](#) detail tab to display the details view.
2. Click Non-ACD Actions section expander to display (or hide) the non-ACD actions section's contents, and complete the following information:

- To have non-ACD interactions automatically answered, select the **Automatically answer non-ACD Interactions** check box.
- To set a specific timeout for incoming interactions, select the **Override the timeout default for incoming interactions (minimum 7 seconds)** check box, and use the up and down arrows or type in the box to set the timeout.



00 : 00 : 45

- To specify a specific action to start when a non-ACD Interaction enters an alerting state, select the **Action**. You can filter the list by typing in the drop-down box. When an action is not specified, a message is displayed:

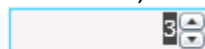


No Action selected

- To specify a specific action to start when a non-ACD Interaction moves to the disconnect state, select the **Action**. You can filter the list by typing in the drop-down box.

3. Click Parked Actions section expander to display the parked actions section's contents, and complete the following information:

- To set a specific timeout for any parked interactions (calls, chats, emails, generic objects), select the **Override the timeout default (minutes)** check box for the specific interaction, and use the up and down arrows or type in the box to set the timeout.




- To transfer a parked interaction after the timeout, select the **Transfer to this extension after a timeout** check box for the specific interaction, and enter the extension.



5555



4. Click Phonetic Spellings section expander to display (or hide) the phonetic spellings section's contents, and complete the following information:


- Type the TTS phonetic spelling for the user in the **Text to Speech** field:

 Enter alternate phonetic spellings of the user name for TTS and ASR.

Text To Speech:

Automatic Speech Recognition spellings:

<input type="text" value="Sally Hurlee"/>	
<input type="text" value="Sallee Hurley"/>	
<input type="text" value="Sally Hurlee"/>	

- Type an ASR spelling for the user, add click . You can add multiple spellings.

5. Click Message Waiting Indicator section expander to display (or hide) the message waiting indicator section's contents, and complete the following information:

- Select the check box to indicate this user has an MWI-enabled phone and the feature should be used.


Enable the message waiting indicator feature for this User

- If enabled either the **Send to the default or logged workstation** or the **Send to following address** option must be selected.

6. Click Client Configuration Templates section expander to display (or hide) the client configuration templates section's contents, and complete the following information:

- To specify a specific a client configuration template for the user, select the template from the drop-down box or type in the box. When a template is not specified, a message is displayed:

7. Click Custom Attributes section expander to display (or hide) the custom attributes section's contents, and complete the following information:


- To create a custom attribute, click  and type an attribute name. You must also enter a value for the new attribute.

<input type="text" value="HomeFax"/>	<input type="text" value="5551212"/>
--------------------------------------	--------------------------------------

8. Click History section expander to display (or hide) the history section's contents, and complete the following information:

- View the **Created** and **Modified** dates for this user. Type or view information in the **Notes** field for the user.

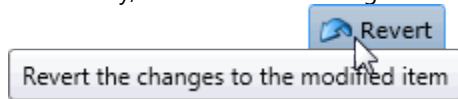
9. Save the new user or modified user.

 Save

Save the modified item (Ctrl+S)

IC Server Manager Administrator Printable Help

If necessary, the new user or changes made to an existing user can be reverted.



Related Topics

[User: General](#)

[User: ACD](#)

[User: Licensing](#)

[User: Administrative Rights](#)

[User: Access Control Rights](#)

[User: Security Rights](#)

[User: Personal Information](#)

User: Advanced Field Descriptions

This topic contains the descriptions for each field in the Advanced details view under the View Users master view.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see [About the Enhanced Interaction Administrator Change Log](#).

Non-ACD Actions

The Non-ACD Actions section includes:

Automatically answer Non-ACD Interactions

When enabled, this setting automatically connects non-ACD interactions to the user's phone. The user must be at his or her station to be automatically connected to a interaction. When a interaction alerts on a user's queue, you can use the Alert tool in Interaction Designer to play a tone, a wave file, or both to inform the agent about the incoming interaction. These are called "whisper tones." This is useful if you are using auto-answer but want to warn a user that another interaction is about to connect to his or her queue. If this box is selected, an agent must be at his or her station to be automatically connected to a interaction.

By default, users are alerted, but not automatically connected to the interaction. When the user's CIC client rings, he or she must manually click the Pickup button or pick up the handset to answer the interaction.

Override the timeout default for incoming Interactions (minimum 7 seconds)

The timeout is the amount of time an incoming interaction rings at the CIC client station before the interaction quits alerting and proceeds to the next step in the handler (for example, goes to voice mail or changes an ACD agent's status to ACD-Agent not answering and offers the interaction to another agent). The default value is 30 seconds. You can change this value by using the up and down arrows to adjust the number (7 is the minimum) of seconds, minutes or hours.

Start this Action when a non-ACD Interaction enters an alerting state

Actions can be thought of as a direct communications link between two application programs. A CIC client can function with other applications as a client and a server application. The specific action selected here, happens when a non-ACD interaction enters an alerting state on this user's queue. Actions available are actions that have been configured in Interaction Administrator.

Start this Action when a non-ACD Interactions moves to the disconnection state

Actions can be thought of as a direct communications link between two application programs. A CIC client can function with other applications as a client and a server application. The specific action selected here, happens when a non-ACD interaction enters a disconnected state on this user's queue. Actions available are actions that have been configured in Interaction Administrator.

Parked Interactions

Use this section to set the maximum time that a parked **call**, **chat**, **email**, or **generic object** will wait on silent hold and to specify the extension that interaction will be transferred to when the time has elapsed. If the time is not set here, the default time is used. If an extension is not specified here, the system IVR is used.

Override the timeout default (minutes)

Set the maximum time in minutes here that a parked call, chat, email or generic object should wait before transfer to the specified extension.

Transfer to this extension after a timeout

Set the destination extension here for a parked call, call, chat, email, or generic object that has reached its timeout.

Phonetic Spellings

These settings define alternate (phonetic) spellings of the user name for Text To Speech (TTS) and Automatic Speech Recognition (ASR). Phonetic spelling options can also be set at the workgroup level.

Text To Speech

The TTS spelling should be a single-valued attribute. You spell the name like it sounds. For example, if a user name is spelled "Rose", but it is pronounced "Rosy", enter "Rosy". If no attribute is entered, the system default is used.

Automatic Speech Recognition spellings

The user can have multiple spellings for ASR. The ASR spelling attribute should be a multi-valued attribute.

The ASR phonetic spelling values are used by the "Reco Create Company Directory Grammar". This can be very useful to add nick names or different spellings of a user's name. Any valid grammar token may be specified in this list. For example, assume a user called "John Smith". That's the first and last name as he is known to the CIC system and used by default for the company directory grammar. However, you want to add additional spellings to increase the coverage of the grammar by adding the following alternate spellings:

- Johnny Smith
- John Robert Smith
- John R Smith

Note: You should be careful not to add too many alternate spellings without actually knowing whether the spellings will be used by callers. If the grammar coverage becomes too broad, in particular if the company directory already contains a lot of similarly sounding names, the recognitions quality will be degraded because of the ambiguity.

Message Waiting Indicator

These settings specify the behavior of Message Waiting Indicator (MWI) for the user. Each phone user must have a CIC user account to receive voice mail.

Enable the message waiting indicator feature for this user

When enabled, this setting indicates this user has an MWI-enabled phone and wishes to use the feature.

If you enable this feature you must select one of the following options:

- **Send to Default or Logged Workstation:** (default) Select this option to send the indicator to the station the user is logged into. If the user is not logged in, it sends the indicator to the user's default workstation.
- **Send to Following Address:** If you select this option, you must also enter the **Address** or directory number.

Note: To enable the MWI feature, you must activate MWI at the default station level, the station level, and the user level.

Client Configuration Templates

Client configuration templates specify CIC client configuration settings, such as how the user is alerted, and what type of call behavior settings are available to the user, and how the CIC client pages are displayed for the user.

These template options can be set at the user or roles level. The templates available in the drop-down list are defined in Client Configuration in Interaction Administrator.

Custom Attributes

Use customized attributes to reference other variables and settings through the IceLib interface. When adding a new attribute, use a unique name, otherwise an existing attribute with the same name will be overwritten. Click **Edit** to change the value of an existing custom attribute, or **Delete** to delete an existing custom attribute.

History

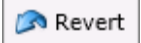
History provides a way to manually document configuration changes and when they occurred. Changes made in Interaction Administrator are also automatically logged in the Interaction Administrator Change Notification Log (Log ID 7). Later, authorized users can run reports against this log to summarize all configuration changes.


Created

This date is automatically set when the user creates the initial configuration for this user. If the user was initially created during setup, the date could be blank.

Modified

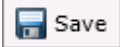
This date is automatically updated each time the user clicks the OK button, presumably after making changes to the user configuration. To avoid updating this date, exit the property sheet by clicking



Note: If you click , none of the changes made to this user since the changes were last saved are preserved.

Notes

Type notes about configuration settings and changes. If you change the configuration and click



, the **Last Modified** date is updated.

You must manually enter the date beside each entry in the **Notes** field to identify the date of each note.

Related Topics

[User: Advanced](#)

[User: General Field Descriptions](#)

[User: ACD Field Descriptions](#)

[User: Licensing Field Descriptions](#)

[User: Administrative Rights Field Descriptions](#)

[User: Access Control Rights Field Descriptions](#)

[User: Security Rights Field Descriptions](#)

[User: Personal Information Field Descriptions](#)

Workgroups

Workgroups are logical groups of users (for example, departments) that can function as a group in the CIC system. Workgroups can have extensions and queues that enable all members of a workgroup to receive calls notifying the workgroup. In addition, workgroups can receive regular calls and ACD calls to specific workgroups and agents. You may also create workgroups to serve as distribution lists (to the members) for voice mail, email, and faxes from within CIC.

There are five types of workgroups:

- ACD - Automatic Communication Distribution
- Group Ring - Simultaneously alerts the members of a Workgroup that a call is available in the queue for that Workgroup.
- Sequential - Alerts individual members of a Workgroup that a new call is available in the queue for that Workgroup.
- Round Robin - Similar to linear hunt groups, IC's Round Robin remembers the last user who was sent a call. Round Robin works in a loop, repeating the process down the through list, and then the process starts over with the next call.
- Custom - (where a custom handler routes the workgroup calls)

The **View Workgroups** page displays workgroups in a list in the master view, and displays details of the currently selected workgroup in the details view. You can take actions on the workgroups in the list view, such as edit, delete or copy, and you can add a new workgroup. You can change the way the list is displayed, such as change visible columns, sort by column, and filter.

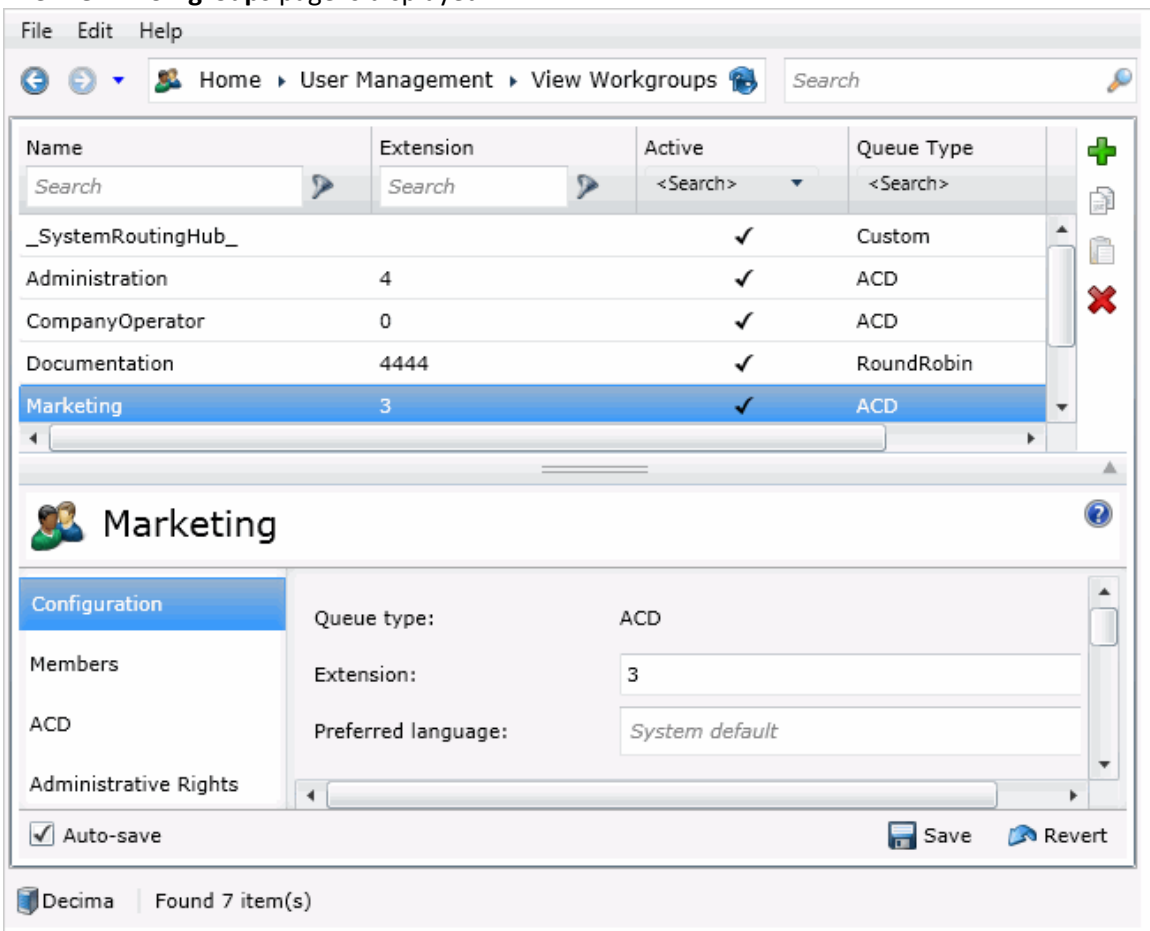
To view workgroups:

1. Click the **View Workgroups** action under the **User Management** category:



...or Click **View Workgroups** in the breadcrumbs if available.

2. The **View Workgroups** page is displayed.



3. The details of the selected workgroup are displayed in the details view.

Related Topics

Introduction to Interaction Administrator Web Edition

[Add a Workgroup](#)

Add a Workgroup

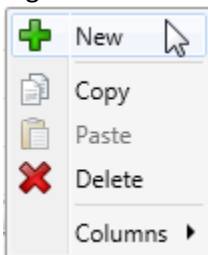
You can configure workgroup settings in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

Notes:

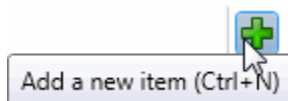
- If you enabled the Enhanced Interaction Administrator Change log, then the addition of the workgroup is tracked in that log. For more information, see *About the Enhanced Interaction Administrator Change Log*.
- If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see *About the Enhanced Interaction Administrator Change Log*.

To add a workgroup:

1. Right-click in the master view area and select **New**:



...Or click the **New** button in the master view toolbar:



The **Add New Workgroup** appears in the details view:

 The 'Add New Workgroup' dialog box is shown. It has a title bar with a question mark icon. Below the title bar is a description: 'A Workgroup is a defined logical group of Users related by function, department, project, or other organization.' The form contains the following fields:

- Name: A text input field containing 'New Item'.
- Queue type: A dropdown menu with 'ACD' selected.
- Extension: An empty text input field with a red border.
- Optional Information: A collapsed section with a downward arrow.

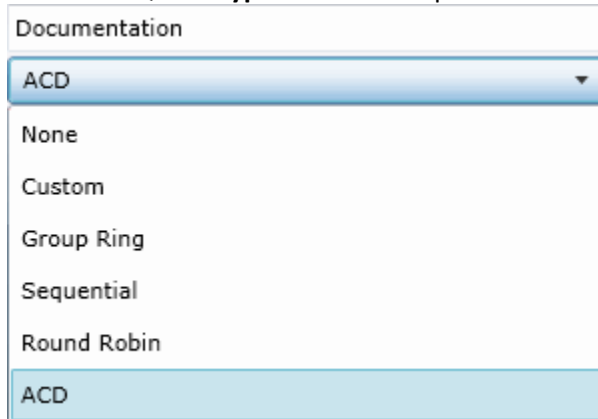
 At the bottom of the dialog, there is a checkbox for 'Auto-save' which is checked, and two buttons: 'Save' (with a floppy disk icon) and 'Cancel' (with a red X icon).

2. Complete the following configuration in the first section:

- Type the **Name** of the workgroup.

Note: Do not exceed 64 characters.

- Select the **Queue type** from the drop-down list.

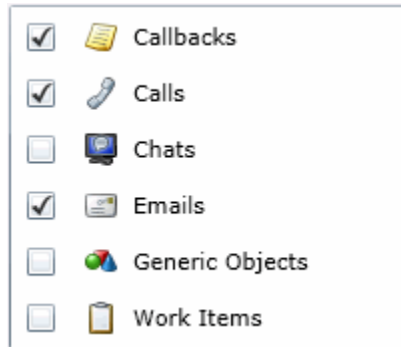


- Depending on the workgroup type, enter the required **Extension**. If the workgroup type requires an extension and no extension is entered, an error is displayed.



3. Click the Optional Information section expander to display (or hide) the optional information section's contents, and complete the following information:

- Select the check box if the workgroup is active.
- Select the check box for each media type that is supported.



4. Complete the workgroup configuration in the seven details tabs. The links below open the topics containing procedures for completing each details tabs configuration:

- [Configuration](#)
- [Members](#)
- [ACD](#)
- [Administrative Rights](#)
- [Access Control Rights](#)
- [Security Rights](#)
- [Advanced](#)

Note: To save a new workgroup, all required information must be entered. Details tabs containing incomplete or erroneous information, are shown with an error indicator (error details are displayed)

on mouse-over):

Configuration 

There is one validation error on this page

Related Topics

Workgroup: Configuration

[Workgroup: Members](#)

[Workgroup: ACD](#)

[Workgroup: Administrative Rights](#)

[Workgroup: Access Control Rights](#)

[Workgroup: Security Rights](#)

[Workgroup: Advanced](#)

Workgroup: Administrative Rights

The Administrative Rights details tab contains configuration of rights to access administrative areas. These options allow access to a sub-set of rights available with the Master Administrator right. These rights control what objects are shown and what objects can be edited in Interaction Administrator. The access can be set at the default user, role, user or workgroup level. Click the name of the details tab for field descriptions.

Notes:

- Administrative, access control and security rights can be inherited from the default user, roles, and workgroups. See Rights Inheritance for more information.
- If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

To complete the workgroup's administrative rights information:






1. Click the [Administrative Rights](#) detail tab to display the details view.
2. Click **Browse for more rights**.

Marketing is not assigned any administrator access rights.

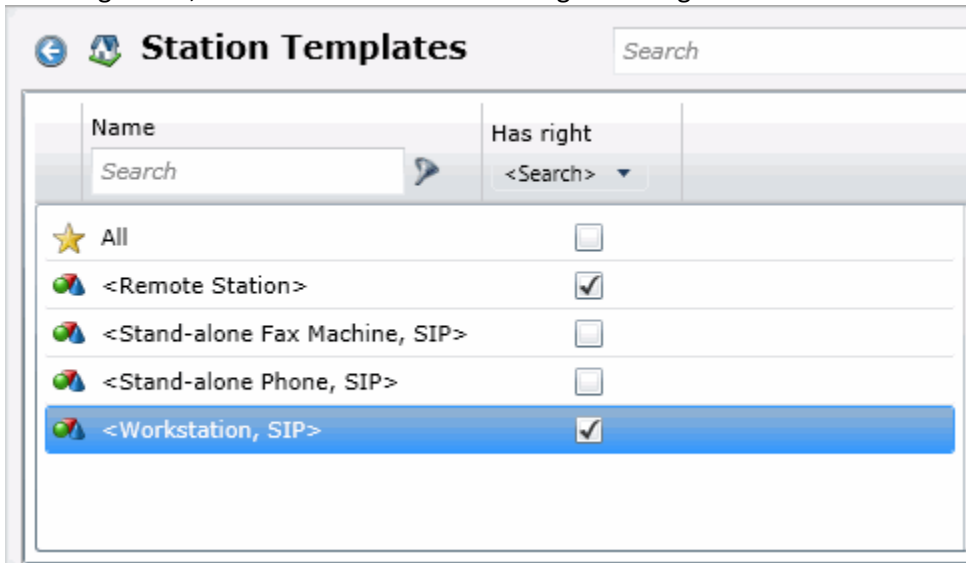
[Browse for more rights](#)






3. Click a rights category to expand the list of specific rights:

-  Overview
-  User Management
-  **Hardware**
-  Applications
-  System

4. In the rights list, select the check box for the right to assign.

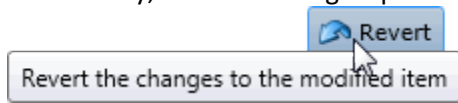


- To filter the rights list, click  and select the filter type to apply to the list and type into the Name search text box.
 - Contains
 - Starts with
 - Matches whole word
- To display the rights assigned select **Yes** from the **Has right** drop-down box. Selecting **No** displays rights that are not assigned to the workgroup.
- Use the  button to return to the previous detail view, or click  to go to the Home category list.

5. Save the new workgroup or modified workgroup.



If necessary, the new workgroup or changes made to an existing workgroup can be reverted.



Example

If members of workgroup need access to edit a queue column, do the following:

1. Click **User Management** in the **Category** list.
2. Click **Queue Columns**.
3. Click **View Rights**.
4. Select the *[All] check box to enable the workgroup members to edit all queue columns.
5. Click **Save**.

To assign the same rights to the default user, user, or role, follow the same procedure.

Related Topics

Workgroup: Configuration

[Workgroup: Members](#)

[Workgroup: ACD](#)

[Workgroup: Access Control Rights](#)

[Workgroup: Security Rights](#)

[Workgroup: Advanced](#)

[Workgroup: Administrative Rights Field Descriptions](#)

Workgroup: Administrative Rights Field Descriptions

This topic contains the descriptions for each administrative right in each category in the Administrative details view under the View Workgroups master view.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

The Home page of the Administrative rights includes the following categories:

- Overview (all administrative rights)
- [User Management](#)
- [Hardware](#)
- [Applications](#)
- [System](#)
- [Collective](#)

The following tables show the available administrator rights groups and the associated descriptions, by category:

User Management Category	
Group	Description
Account Codes	Determines if account codes can be edited.
Actions	Determines if actions configuration can be edited.
Client Buttons	Determines if CIC client buttons can be edited.
Client Configuration	Determines if CIC client configuration can be edited.
Client Configuration Templates	Determines if CIC client configuration templates can be edited.
Default User	Determines if the default user can be edited.
Password Policies	Determines if password policies can be edited.
Password Policies Configuration	Determines if password policy configuration can be edited.
Queue Columns	Determines if queue columns can be edited.
Response Management	Determines if response management configuration can be edited.
Roles	Determines if roles can be edited.
Schedules	Determines if schedules configuration can be edited.
Secure Input Forms	Determines if secure input forms configuration can be edited
Skills	Determines if skills can be edited.
Status Messages	Determines if status message configuration can be edited.
Users	Determines if users can be edited.
Wrap-up Codes	Determines if wrap-up codes can be edited.
Wrap-up Categories	Determines if wrap-up categories can be edited.
Workgroups	Determines if workgroups can be edited.
Hardware Category	
Group	Description
Default Station	Determines if default station configuration can be edited.
Stations	Determines if station configuration can be edited.
Station Groups	Determines if station group configuration can be edited.
Station Templates	Determines if station template configuration can be edited.
Default IP Phone	Determines if default IP phone configuration can be edited.

IP Phones	Determines if IP phone configuration can be edited.
IP Phone Registration Groups	Determines if IP phone registration group configuration can be edited.
IP Phone Templates	Determines if IP phone template configuration can be edited.
IP Phone Ring Sets	Determines if IP phone ring set configuration can be edited.
Applications Category	
Group	Description
Interaction Feedback	Determines if Interaction Feedback configuration can be edited.
Interaction Process Automation	Determines if Interaction Process Automation configuration can be edited.
Interaction Conference	Determines if Interaction Conference configuration can be edited.
Interaction Conference Rooms	Determines if Interaction Conference Rooms configuration can be edited.
Interaction Optimizer Activity Types	Determines if activity types configuration can be edited.
Interaction Optimizer Advanced Configuration	Determines if advanced configuration can be edited.
Interaction Optimizer Agents	Determines if agent configuration can be edited.
Interaction Optimizer Day Classifications	Determines if day classification configuration can be edited.
Interaction Optimizer Forecasts and Schedules	Determines if forecasts and schedules configuration can be edited.
Interaction Optimizer Scheduling Units	Determines if scheduling unit configuration can be edited.
Interaction Dialer Call Lists	Determines if Dialer call list configuration can be edited.
Interaction Dialer Campaigns	Determines if Dialer campaigns configuration can be edited.
Interaction Dialer Configuration	Determines if Dialer configuration can be edited.
Interaction Dialer Policy Sets	Determines if Dialer policy sets configuration can be edited.
Interaction Dialer Rule Sets	Determines if Dialer rule sets configuration can be edited.
Interaction Dialer Schedules	Determines if Dialer schedules configuration can be edited.
Interaction Dialer Scripts	Determines if Dialer scripts configuration can be edited.
Interaction Dialer Skill Sets	Determines if Dialer skill sets configuration can be edited.

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Interaction Dialer Stage Sets	Determines if Dialer stage sets configuration can be edited.
Interaction Dialer Zone Sets	Determines if Dialer zone sets configuration can be edited.
Interaction Analyzer Keyword Sets	Determines which Interaction Analyzer Keyword Sets can be edited.
Interaction Recorder	Determines if Interaction Recorder configuration can be edited.
Interaction Tracker	Determines if Interaction Tracker configuration can be edited.
System Category	
Group	Description
Accumulators	Determines if accumulator configuration can be edited.
Audio Sources	Determines if audio source configuration can be edited.
Contact Data Manager	Determines if contact data manager configuration can be edited.
Contact List Sources	Determines if contact list source configuration can be edited.
Default Location	Determines if default location configuration can be edited.
e-FAQ	Determines if e-FAQ configuration can be edited.
Fax	Determines if fax configuration can be edited.
Fax Groups	Determines if fax groups configuration can be edited.
Handlers	Determines if handler configuration can be edited.
Historical Reports	Determines if historical reports configuration can be edited.
IC Data Sources	Determines if CIC data source configuration can be edited.
Initialization Functions	Determines if initialization configuration can be edited.
Interaction Processor Tables	Determines if Interaction Processor tables can be edited.
License Allocation	Determines if license allocation configuration can be edited.
Lines	Determines if line configuration can be edited.
Line Groups	Determines if line group configuration can be edited.
Locations	Determines if location configuration can be edited.
Log Retrieval Assistant	Determines if log retrieval assistant configuration can be edited.
Lync	Determines if Lync configuration can be edited.
MRCP	Determines if MRCP configuration can be edited.
Mail	Determines if mail configuration can be edited.
Media Servers	Determines if media servers configuration can be edited.

Lync Active Directories	Determines if Lync Active Directories configuration can be edited.
Lync Status Messages	Determines if Lync Status Messages configuration can be edited.
Paging Carriers	Determines if paging carrier configuration can be edited.
Phone Numbers	Determines if SIP Proxies configuration can be edited.
Report Logs	Determines if report logs configuration can be edited.
Servers	Determines if server configuration can be edited.
Server Parameters	Determines if server parameter configuration can be edited.
Session Managers	Determines if session managers configuration can be edited.
SIP Proxies	Determines if SIP proxies configuration can be edited.
SMS	Determines if SMS configuration can be edited.
SMS Broker	Determines if SMS broker configuration can be edited.
Speech Recognition	Determines if speech recognition configuration can be edited.
Structured Parameters	Determines if structured parameter configuration can be edited.
System	Determines if system configuration can be edited.
System Parameters	Determines if system parameter configuration can be edited.
Voice Modules	Determines if voice module configuration can be edited.
Web Services Parameters	Determines if web service parameter configuration can be edited.
Collective Category	
Group	Description
Collective	Determines if the home site can be edited.
Peer Sites	Determines if the peer sites can be edited

Related Topics

[Workgroup: Administrative Rights](#)

Workgroup: Configuration Field Descriptions

[Workgroup: Members Field Descriptions](#)

[Workgroup: ACD Field Descriptions](#)

[Workgroup: Access Control Rights Field Descriptions](#)

[Workgroup: Security Rights Field Descriptions](#)

[Workgroup: Advanced Field Descriptions](#)

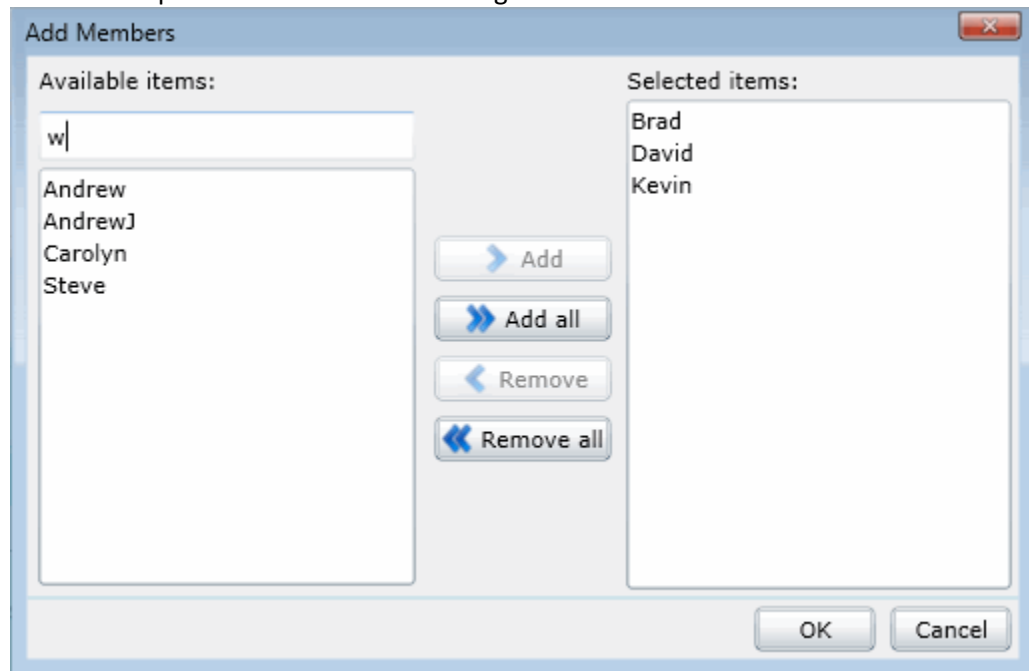
Workgroup: Members

The Configuration details tab contains general information, wrap-up codes, audio files, security and keyword sets configuration for the user. Click the name of the details tab for field descriptions.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.


To complete the workgroup's member information:

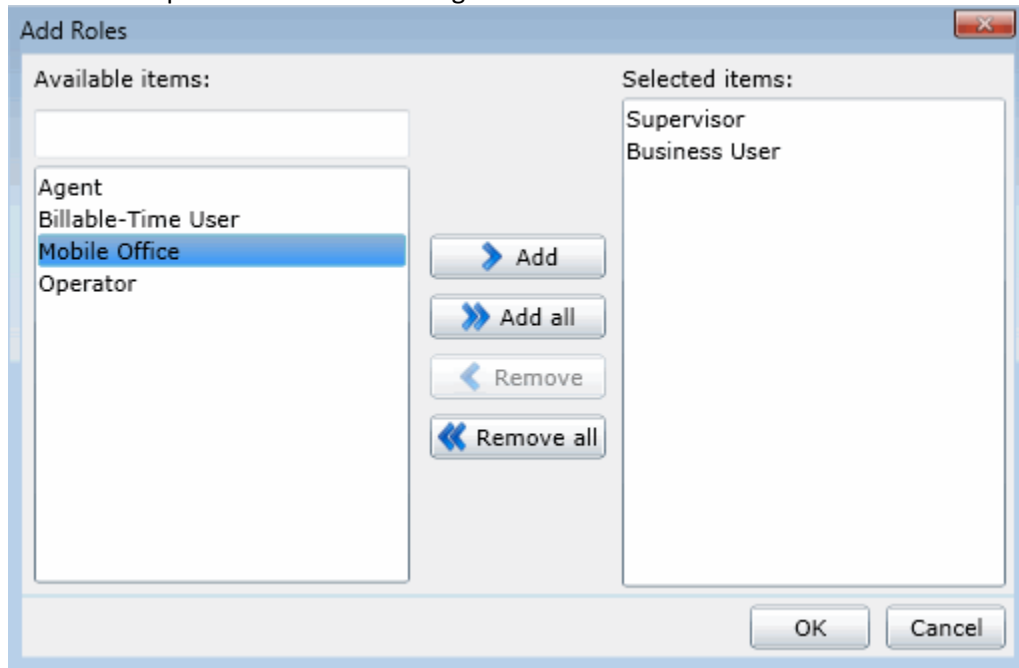
1. Click the **Members** details tab to display the details view.
2. Click the Members section expander to display (or hide) the members section's contents, and complete the following information:
 - Click **+** to open the **Add Members** dialog box:




Select one or more users in the **Available** items list, and click **Add** to add the user(s) to the **Selected** items list. You can also click **Add all** to add all users. To filter the list of users, type in the filter field above the list.

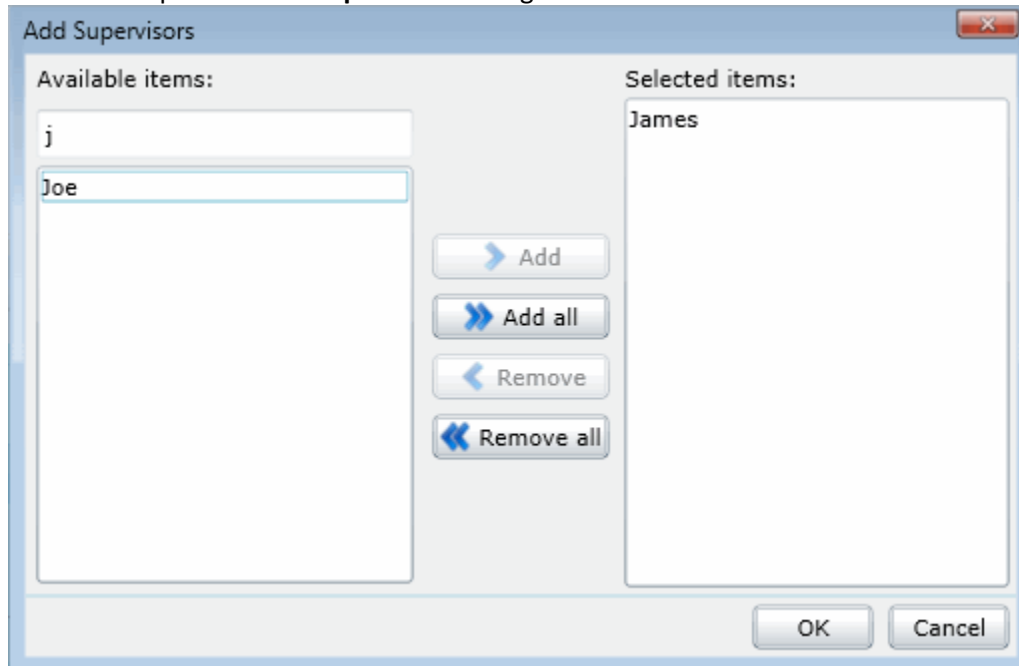
- Click **↑** or **↓** to change the order of items. The order can be changed when the workgroup is of sequential, round robin, or custom queue type.
3. Click the Roles section expander to display (or hide) the roles section's contents, and complete the following information:

- Click  to open the **Add Roles** dialog box:



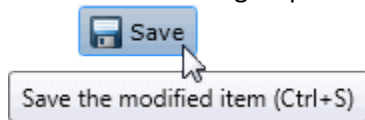
Select one or more roles in the **Available** items list, and click **Add** to add the role(s) to the **Selected** items list. You can also click **Add all** to add all roles. To filter the list of roles, type in the filter field above the list.

- Click the Supervisor section expander to display (or hide) the supervisor section's contents, and complete the following information:
 - Click  to open the **Add Supervisors** dialog box:

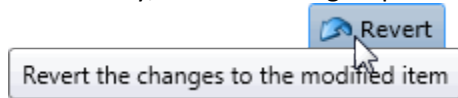


Select one or more users that are supervisors (users assigned the supervisor role) in the **Available** items list, and click **Add** to add the supervisor(s) to the **Selected** items list. You can also click **Add all** to add all supervisors. To filter the list of supervisors, type in the filter field above the list.

5. Save the new workgroup or modified workgroup.



If necessary, the new workgroup or changes made to an existing workgroup can be reverted.



Related Topics

Workgroup: Configuration

[Workgroup: ACD](#)

[Workgroup: Administrative Rights](#)

[Workgroup: Access Control Rights](#)

[Workgroup: Security Rights](#)

[Workgroup: Advanced](#)

[Workgroup: Members Field Descriptions](#)

Workgroup: Members Field Descriptions

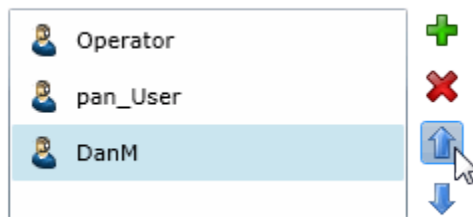
This topic contains the descriptions for each field in the **Members** details view under the **View Workgroups** page.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see [About the Enhanced Interaction Administrator Change Log](#).

Members

When a user (member) is added to a workgroup, the user takes on the workgroup's permissions, but you can override the permissions at the user level.

You can optionally specify the order for alerting workgroup members when the workgroup has a queue *and* it is not an ACD queue, such as Round Robin.



Roles

A role is a set of permissions. When a role is added to a workgroup, the role takes on the workgroup's permissions. The default roles are:

- Administrator
- Supervisor

- Agent
- Operator
- Business User
- Billable-Time User
- Mobile Office

Supervisors

If you add a user here as a supervisor, this user will receive all messages from the workgroup users sending supervisor alerts.

Related Topics

Workgroup: Configuration

[Workgroup: Members Field Descriptions](#)

[Workgroup: ACD Field Descriptions](#)

[Workgroup: Administrative Rights Field Descriptions](#)

[Workgroup: Access Control Rights Field Descriptions](#)

[Workgroup: Security Rights Field Descriptions](#)

[Workgroup: Advanced Field Descriptions](#)

Workgroup: ACD

The ACD details tab contains utilization, skills, statistics, actions, queue service levels, and after call work. Click the name of the details tab for field descriptions.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see [About the Enhanced Interaction Administrator Change Log](#).

To complete the workgroup's ACD information:

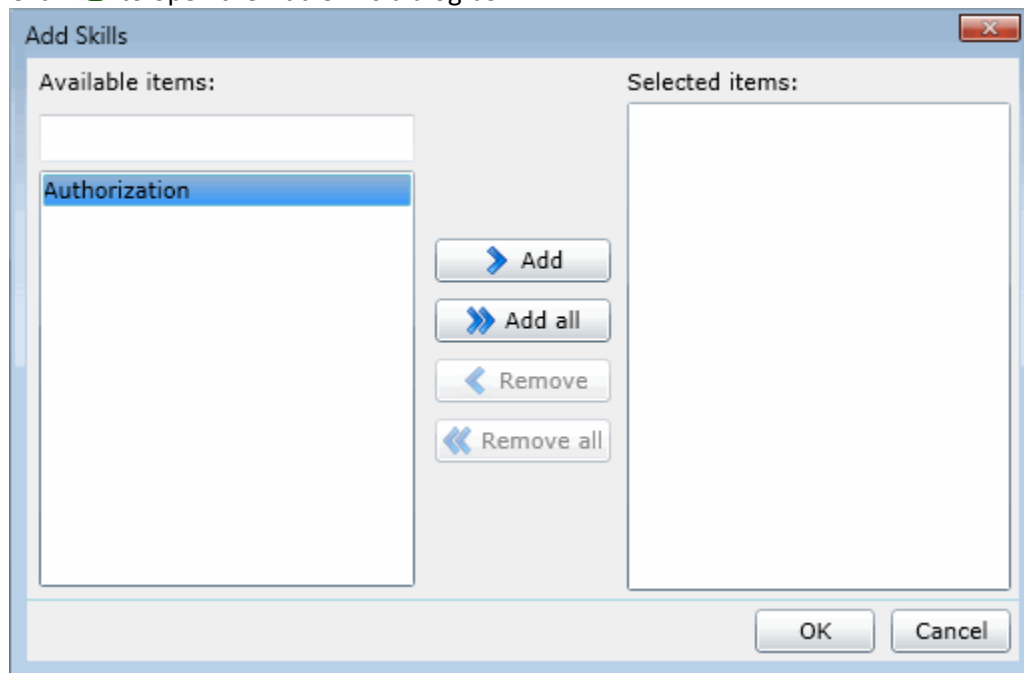
1. Click the [ACD](#) detail tab to display the details view.
2. Click the Utilizations section expander to display (or hide) the utilizations section's contents, and complete the following information:

- To set the interaction type's **% Utilization** and **Max Assignable** for each **Interaction Type**, use the arrows or type the number.

Interaction Type	% Utilization	Max Assignable
Callbacks	88 %	1
Calls	97 %	3
Chats	100 %	1
Emails	100 %	1
Generic Objects	100 %	1
Work Items	100 %	1

- Click the Skills section expander to display (or hide) the skills section's contents, and complete the following information:

- Click to open the **Add Skills** dialog box:

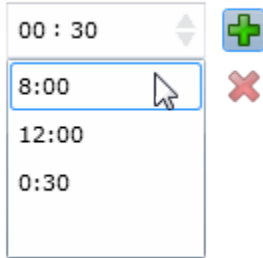


Select one or more skills in the **Available items** list, and click **Add** to add the skill(s) to the **Selected items** list. You can also click **Add all** to add all skills. To filter the list of skills, type in the filter field above the list. If there are no previously configured skills, there are no entries in list of available items.

- Select The **Use Availability Time in Skills Calculation** check box to change the calculation of how skills are configured.
- Click the Statistics section expander to display (or hide) the statistics section's contents, and complete the following information:
 - Use the up and down arrows or type the number to set the **Call statistics period (minutes)**.
 - Use the up and down arrows or type the number to set the **Estimated call time interval (minutes)**.

- Use the up and down arrows or type the number of the time to set the beginning of a shift.

After entered, click  to add the time to the list.

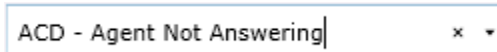


5. Click the Actions section expander to display (or hide) the actions section's contents, and complete the following information:

- To specify a specific action to start when an ACD interaction enters an alerting state for members of this workgroup, select the action in **Alerting action**. You can filter the list by typing in the drop-down box. If there are no previously actions, there are no entries in list of available items. When an action is not specified, a message is displayed:

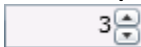


- To specify a specific action to start when an ACD interaction moves to the disconnect state for members of this workgroup, select the action in **Disconnected action**. You can filter the list by typing in the drop-down box.
- Select the **No-answer status** message to display when an interaction is not answered.

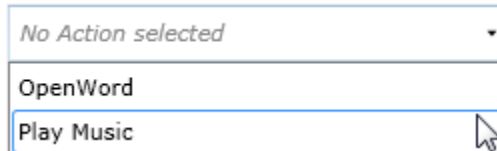


You can filter the list by typing in the drop-down box.

- Use the up and down arrows or type the number to set the **Revert to available timeout (seconds)**.



- To specify a specific action to start when an ACD interaction is transferred, select the action in **Transfer action**. You can filter the list by typing in the drop-down box.

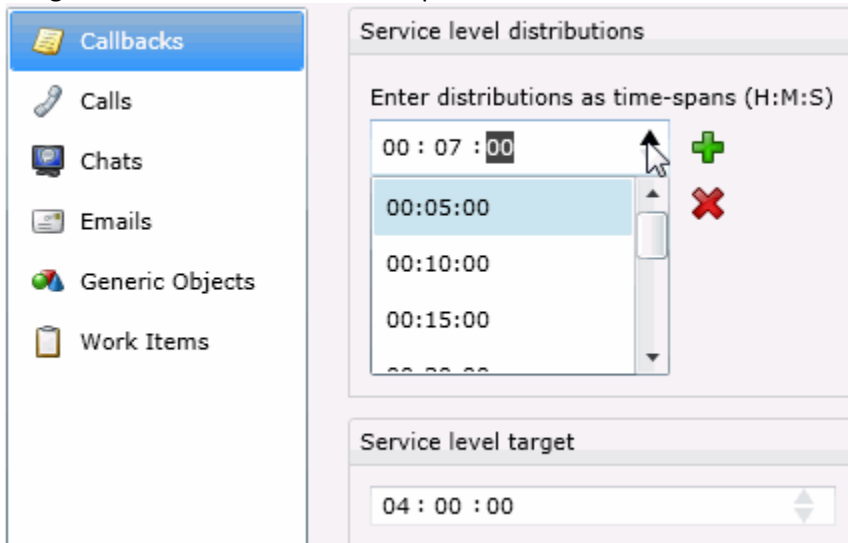


Select **Execute transfer action in user transfer** to perform this action automatically in a user transfer.

- Select the **On-call status** to displayed when a user is on an ACD call. You can filter the list by typing in the drop-down box.

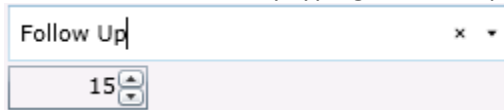
6. Click the Queue Service Levels section expander to display (or hide) the queue service levels section's contents, and complete the following information:

- To specify a queue service level, select the interaction type, and use the up and down arrow or type a number for the **Service level distribution**.



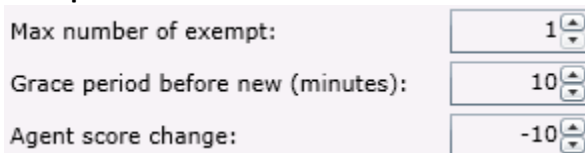
Use the up and down arrows or type a number for the **Service level target**.

7. Click the After Call Work section expander to display (or hide) the after call work section's contents, and complete the following information:
 - To set the **Status** for **Show after call work status**, select the status in the drop-down box. You can filter the list by typing in the drop-down box.



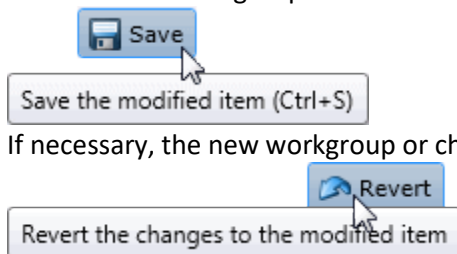
Use the up and down arrows or type a time to set a specific time to show the status.

- To allow agents who have ACD interactions on hold to receive new ACD interactions, select **Exempt held interactions**.



Use the up and down arrows or type a time to set the associated exempt held interaction parameters.

8. Save the new workgroup or modified workgroup.



If necessary, the new workgroup or changes made to an existing workgroup can be reverted.

Related Topics

Workgroup: Configuration

[Workgroup: Members](#)

[Workgroup: Administrative Rights](#)

[Workgroup: Access Control Rights](#)

[Workgroup: Security Rights](#)

[Workgroup: Advanced](#)

[Workgroup: ACD Field Descriptions](#)

Workgroup: ACD Field Descriptions

This topic contains the descriptions for each field in the ACD details view under the View Workgroups page.

For ACD applications that use skills based call routing, you can configure each ACD workgroup with skills and attributes. Each skill associated with a workgroup is described in terms of that workgroup's members proficiency in that skill and member's desire to use that skill. A user that is a member of this workgroup can inherit skills defined here, but can be overridden at the [user ACD](#) level.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see [About the Enhanced Interaction Administrator Change Log](#).

Utilizations

Users can handle multiple phone calls, email messages, callbacks, chats, and other interactions simultaneously and in any combination. Using the ACD utilization settings, you can configure how much of a workgroup member's attention would be required for each of the interaction types as a percentage.

For example, if the chat category is set to 25%, it means that the workgroup member can handle up to four chat events simultaneously. Indicating 100% for an event type means that the workgroup member can handle only one such event at a time.

The percentages might vary from workgroup to workgroup based on experience. Workgroup members are available to the extent that the sum of the percentage utilization of all their current interactions is less than 100.

For example, if a workgroup member is configured so that phone calls are set to 100 percent, chats to 25 percent, and email messages to 10 percent, then the workgroup member could, at any given time, process one phone call, or four chats, or two chats and five email messages, or one chat and seven email messages, and so forth.

These are the utilization options that can be set at the ACD workgroup level.

Interaction Type

The **Interaction Type** list displays the interaction types assigned to this workgroup, including Callbacks, Calls, Chats, Emails, Generic Objects, or Work Items.

% Utilization

The **% Utilization** list shows the percentage of a workgroup member's attention required for each interaction type. This value can be overridden at the user level. See [User: ACD](#) for more information.

Max Assignable

The **Max Assignable** list displays the maximum number of interactions allowed for this interaction type. This value can be overridden at the user level. See [User: ACD](#) for more information.

Skills

Workgroup queues can be used to deliver regular interactions and ACD interactions. Non-ACD interactions can appear on a workgroup queue and be answered by any workgroup member monitoring that queue. ACD interactions are routed to the appropriate workgroup based on caller input. All members of that workgroup are expected to have a core set of skills required to handle any interaction on that queue. Further ACD processing directs the interaction to the most appropriate user who is a member of that workgroup based on each [user's ACD](#) settings.

These settings define the minimal skill set required by all members of this workgroup who handle ACD calls. If this workgroup does not have a queue or does not handle skills-based ACD calls, no skills are required.

Skills

This is the name of the skill as configured in Skills. Skills represent the particular characteristic, skill, product, or knowledge that a user or workgroup possesses. Skills should also correspond to callers' requirements for telephone (or other interaction) assistance.

Proficiency

This value indicates the minimum proficiency of skill level workgroup members must have to receive an ACD interaction requiring this skill. 100 is the highest skill level required. Each member's skill attributes, including proficiency level, are defined in [User ACD](#). The default value is 1.

Desire to Use

This value indicates the minimum desire to use level workgroup members must have to receive an ACD interaction requiring this skill. 100 is the highest skill level required. Each member's skill attributes, including desire to use level, are defined in [User ACD](#). The default value is 0.

Note: **Proficiency** and **Desire to Use** are attributes that are considered when the ACD workgroup type is Custom. For detailed information on skills-based routing using the ACD Specify Interaction Skill Tool, see the *ACD Processing Technical Reference* in the PureConnect Documentation Library.

Select The **Use Availability Time in Skills Calculation** check box to calculate skills with a formula that uses Availability Time, in addition to Desire to Use and Proficiency. Interaction Attendant uses skill settings in the skills-based routing.

Statistics

These workgroup ACD settings appear only in the workgroup ACD tab since these fields affect only call statistics for the workgroup queues that belong to an ACD workgroup.

Call Statistics Period (minutes)

The is the number of minutes used to define the "current period" and the "previous period" statistics on the Queues page in Interaction Supervisor. The statistics period includes every X number of minutes from midnight to the current time, where X is the number in the field. The default time is 30 minutes, which means the "current period" and "previous period" changes on every half-hour boundary.

Estimated Call Time Interval (minutes)

The ACD Statistics (Call or Queue) tools in a handler that provides callers with estimated wait time feedback, uses this number of minutes in its wait time calculation. This is a rolling interval, which means the interval is the number of minutes prior to each use of the estimated wait time function as it is invoked on the IC server. The ACD Statistics tools calculate the estimated wait time for a caller in a queue by taking the average time all callers waited in the queue during the current interval (for example, the previous 30 minutes from the time the ACD Statistics tool in a handler was invoked). The default setting for the interval is 30 minutes.

Statistic Shift Starts

This list of times determines the beginning time and duration of each shift for the members of the workgroup. These times are used to define (relative to the current time) the "current shift" and the "previous shift" on the Queues page in Interaction Supervisor. The default statistic shift is a 24 hour shift starting at midnight (0:00), meaning the statistics are relative to one day (or 24 hours).

Note: To change a shift time, first delete it and then add a new time to replace it.

Actions

ACD calls directed to a workgroup can initiate actions when the interaction arrives on a user's station, is disconnected, or transferred from the user's station. For example, when an ACD call alerts the user's station, a database application can start. When the call is disconnected or transferred, either of those actions can initiate another database application specifically used for completing records or follow-up on the call.

Alerting Action

This is the action started on a station each time an interaction enters an alerting state (for example, the station rings) in this workgroup queue.

Disconnected Action

This is the action started on a station each time an interaction moves from a connected state to a disconnected state (that is, the interaction terminates) in this workgroup queue.

No-answer Status

This is the status message displayed in a workgroup user's My Status field when the user is alerted by an ACD interaction and does not answer it.

Note: The selected status message should have the "Status is Do Not Disturb" attribute.

Revert to available timeout (seconds)

This is the time interval (in seconds) to automatically return a workgroup user's status to what the status was prior to going to Agent Not Answering. If the status has been changed in the meantime, the user's status will not be reset. The default value is 0 which does not automatically revert the status.

Transfer Action

This is the action started on a workgroup user's station each time an interaction is not answered or is transferred by the user in this workgroup queue.

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If a user does not pick up an alerting ACD interaction, it times out and the user's status is automatically changed to ACDAgentNotAnswering. The Alerting Action may need to be terminated, or some other action performed if the user does not pick up the interaction. When the user's status is ACDAgentNotAnswering, the no more interactions are assigned until the user changes the status to Available.

If a user transfers an interaction using a CIC client, the same Transfer Action may optionally be invoked if the **Execute Transfer Action in user transfer** check box is selected. If selected, the transfer action is automatically invoked when the user manually transfers a call from his or her station. By default, no transfer action is specified so no DDE action is performed when a user manually transfers a call. If a transfer action is defined and this option is not selected, the action is invoked only when an ACD interaction is not picked up at a user's station and then transfers to another user.

Incoming Transfer Action

This action started on a workgroup user's station when the user receives an ACD interaction transferred from another user. This allows a user who starts an ACD interaction to transfer that interaction to another user and allows the second user to see the appropriate action when the interaction alerts.

This action is valid only when the transfer is from one workgroup user to another user (not from a workgroup user to a workgroup, line, station, or other type of queue).

On Call Status

This is the status assigned to a workgroup user (and displayed in the user's My Status box) while the user is on an ACD interaction. After the interaction disconnects, the user's status changes to Follow-up (or the Wrap-up status setting) for the designated period before returning to the user's status before the interaction (for example, Available).

Queue Service Levels

Use this page to configure service level distribution and target for each interaction type.

Service Level Distribution

Each interaction has the following default service levels:

- **Callbacks:**

- 5 minutes
- 10 minutes
- 15 minutes
- 30 minutes
- 1 hour
- 2 hours
- 4 hours
- 8 hours

- **Calls:**

- 5 seconds
- 10 seconds
- 20 seconds
- 30 seconds

40 seconds
 50 seconds
 1 minute
 2 minutes

- **Chats:**

10 seconds
 20 seconds
 30 seconds
 45 seconds
 1 minute
 1 minutes 30 seconds
 2 minutes
 4 minutes

- **Emails:**

5 minutes
 10 minutes
 20 minutes
 30 minutes
 1 hours
 2 hours
 4 hours
 8 hours

- **Generic Objects:**

10 seconds
 20 seconds
 30 seconds
 45 seconds
 1 minute
 1 minute 30 seconds
 2 minutes
 4 minutes

- **Work Items:**

30 seconds
 1 minute
 15 minutes
 30 minutes
 1 hour
 4 hours

Service Level Target

This is the time for the target or 'master' service level for each interaction type for this ACD workgroup. By specifying a master service level, you can determine how many interactions met the level, and how many did not meet it. The default service level target for each interaction is:

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- **Callbacks:** 4 hours
- **Calls:** 30 seconds
- **Chats:** 30 seconds
- **Emails:** 4 hours
- **Generic Objects:** 30 seconds
- **Work Items:** 4 hours

Related Topics

[Workgroup: ACD](#)

Workgroup: Configuration Field Descriptions

[Workgroup: Members Field Descriptions](#)

[Workgroup: Administrative Rights Field Descriptions](#)

[Workgroup: Access Control Rights Field Descriptions](#)

[Workgroup: Security Rights Field Descriptions](#)

[Workgroup: Advanced Field Descriptions](#)

Workgroup: Administrative Rights

The Administrative Rights details tab contains configuration of rights to access administrative areas. These options allow access to a sub-set of rights available with the Master Administrator right. These rights control what objects are shown and what objects can be edited in Interaction Administrator. The access can be set at the default user, role, user or workgroup level. Click the name of the details tab for field descriptions.

Notes:

- Administrative, access control and security rights can be inherited from the default user, roles, and workgroups. See Rights Inheritance for more information.
- If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

To complete the workgroup's administrative rights information:






1. Click the [Administrative Rights](#) detail tab to display the details view.
2. Click **Browse for more rights**.

Marketing is not assigned any administrator access rights.

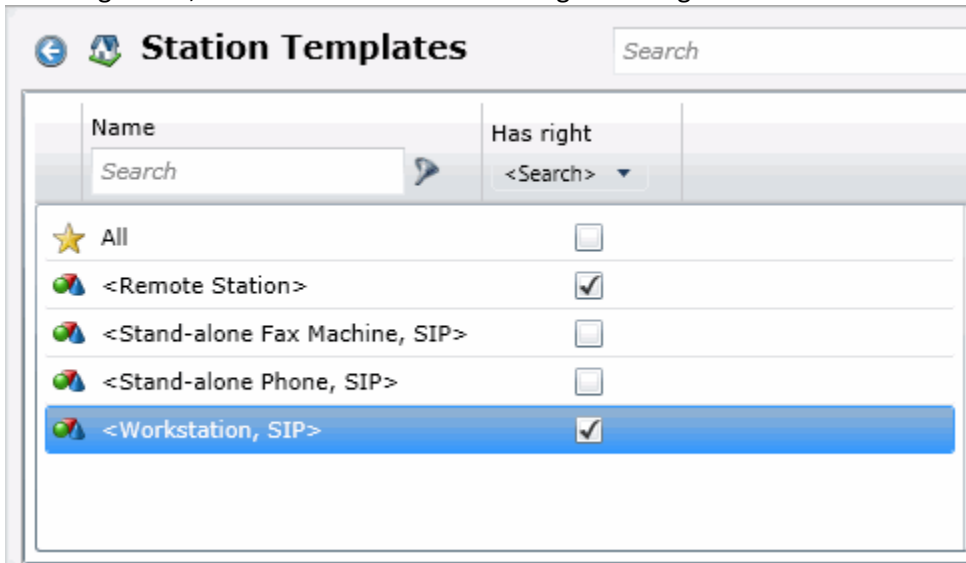
[Browse for more rights](#)






3. Click a rights category to expand the list of specific rights:

-  Overview
-  User Management
-  **Hardware**
-  Applications
-  System

4. In the rights list, select the check box for the right to assign.



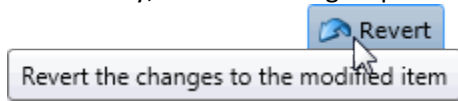
- To filter the rights list, click  and select the filter type to apply to the list and type into the Name search text box.

Contains
 Starts with
 Matches whole word
- To display the rights assigned select **Yes** from the **Has right** drop-down box. Selecting **No** displays rights that are not assigned to the workgroup.
- Use the  button to return to the previous detail view, or click  to go to the Home category list.

5. Save the new workgroup or modified workgroup.



If necessary, the new workgroup or changes made to an existing workgroup can be reverted.



Example

If members of workgroup need access to edit a queue column, do the following:

1. Click **User Management** in the **Category** list.
2. Click **Queue Columns**.
3. Click **View Rights**.
4. Select the *[All] check box to enable the workgroup members to edit all queue columns.
5. Click **Save**.

To assign the same rights to the default user, user, or role, follow the same procedure.

Related Topics

Workgroup: Configuration

[Workgroup: Members](#)

[Workgroup: ACD](#)

[Workgroup: Access Control Rights](#)

[Workgroup: Security Rights](#)

[Workgroup: Advanced](#)

[Workgroup: Administrative Rights Field Descriptions](#)

Workgroup: Administrative Rights Field Descriptions

This topic contains the descriptions for each administrative right in each category in the Administrative details view under the View Workgroups master view.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

The Home page of the Administrative rights includes the following categories:

- Overview (all administrative rights)
- [User Management](#)
- [Hardware](#)
- [Applications](#)
- [System](#)
- [Collective](#)

The following tables show the available administrator rights groups and the associated descriptions, by category:

User Management Category	
Group	Description
Account Codes	Determines if account codes can be edited.
Actions	Determines if actions configuration can be edited.
Client Buttons	Determines if CIC client buttons can be edited.
Client Configuration	Determines if CIC client configuration can be edited.
Client Configuration Templates	Determines if CIC client configuration templates can be edited.
Default User	Determines if the default user can be edited.
Password Policies	Determines if password policies can be edited.
Password Policies Configuration	Determines if password policy configuration can be edited.
Queue Columns	Determines if queue columns can be edited.
Response Management	Determines if response management configuration can be edited.
Roles	Determines if roles can be edited.
Schedules	Determines if schedules configuration can be edited.
Secure Input Forms	Determines if secure input forms configuration can be edited
Skills	Determines if skills can be edited.
Status Messages	Determines if status message configuration can be edited.
Users	Determines if users can be edited.
Wrap-up Codes	Determines if wrap-up codes can be edited.
Wrap-up Categories	Determines if wrap-up categories can be edited.
Workgroups	Determines if workgroups can be edited.
Hardware Category	
Group	Description
Default Station	Determines if default station configuration can be edited.
Stations	Determines if station configuration can be edited.
Station Groups	Determines if station group configuration can be edited.
Station Templates	Determines if station template configuration can be edited.
Default IP Phone	Determines if default IP phone configuration can be edited.

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IP Phones	Determines if IP phone configuration can be edited.
IP Phone Registration Groups	Determines if IP phone registration group configuration can be edited.
IP Phone Templates	Determines if IP phone template configuration can be edited.
IP Phone Ring Sets	Determines if IP phone ring set configuration can be edited.
Applications Category	
Group	Description
Interaction Feedback	Determines if Interaction Feedback configuration can be edited.
Interaction Process Automation	Determines if Interaction Process Automation configuration can be edited.
Interaction Conference	Determines if Interaction Conference configuration can be edited.
Interaction Conference Rooms	Determines if Interaction Conference Rooms configuration can be edited.
Interaction Optimizer Activity Types	Determines if activity types configuration can be edited.
Interaction Optimizer Advanced Configuration	Determines if advanced configuration can be edited.
Interaction Optimizer Agents	Determines if agent configuration can be edited.
Interaction Optimizer Day Classifications	Determines if day classification configuration can be edited.
Interaction Optimizer Forecasts and Schedules	Determines if forecasts and schedules configuration can be edited.
Interaction Optimizer Scheduling Units	Determines if scheduling unit configuration can be edited.
Interaction Dialer Call Lists	Determines if Dialer call list configuration can be edited.
Interaction Dialer Campaigns	Determines if Dialer campaigns configuration can be edited.
Interaction Dialer Configuration	Determines if Dialer configuration can be edited.
Interaction Dialer Policy Sets	Determines if Dialer policy sets configuration can be edited.
Interaction Dialer Rule Sets	Determines if Dialer rule sets configuration can be edited.
Interaction Dialer Schedules	Determines if Dialer schedules configuration can be edited.
Interaction Dialer Scripts	Determines if Dialer scripts configuration can be edited.
Interaction Dialer Skill Sets	Determines if Dialer skill sets configuration can be edited.

Interaction Dialer Stage Sets	Determines if Dialer stage sets configuration can be edited.
Interaction Dialer Zone Sets	Determines if Dialer zone sets configuration can be edited.
Interaction Analyzer Keyword Sets	Determines which Interaction Analyzer Keyword Sets can be edited.
Interaction Recorder	Determines if Interaction Recorder configuration can be edited.
Interaction Tracker	Determines if Interaction Tracker configuration can be edited.
System Category	
Group	Description
Accumulators	Determines if accumulator configuration can be edited.
Audio Sources	Determines if audio source configuration can be edited.
Contact Data Manager	Determines if contact data manager configuration can be edited.
Contact List Sources	Determines if contact list source configuration can be edited.
Default Location	Determines if default location configuration can be edited.
e-FAQ	Determines if e-FAQ configuration can be edited.
Fax	Determines if fax configuration can be edited.
Fax Groups	Determines if fax groups configuration can be edited.
Handlers	Determines if handler configuration can be edited.
Historical Reports	Determines if historical reports configuration can be edited.
IC Data Sources	Determines if CIC data source configuration can be edited.
Initialization Functions	Determines if initialization configuration can be edited.
Interaction Processor Tables	Determines if Interaction Processor tables can be edited.
License Allocation	Determines if license allocation configuration can be edited.
Lines	Determines if line configuration can be edited.
Line Groups	Determines if line group configuration can be edited.
Locations	Determines if location configuration can be edited.
Log Retrieval Assistant	Determines if log retrieval assistant configuration can be edited.
Lync	Determines if Lync configuration can be edited.
MRCP	Determines if MRCP configuration can be edited.
Mail	Determines if mail configuration can be edited.
Media Servers	Determines if media servers configuration can be edited.

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Lync Active Directories	Determines if Lync Active Directories configuration can be edited.
Lync Status Messages	Determines if Lync Status Messages configuration can be edited.
Paging Carriers	Determines if paging carrier configuration can be edited.
Phone Numbers	Determines if SIP Proxies configuration can be edited.
Report Logs	Determines if report logs configuration can be edited.
Servers	Determines if server configuration can be edited.
Server Parameters	Determines if server parameter configuration can be edited.
Session Managers	Determines if session managers configuration can be edited.
SIP Proxies	Determines if SIP proxies configuration can be edited.
SMS	Determines if SMS configuration can be edited.
SMS Broker	Determines if SMS broker configuration can be edited.
Speech Recognition	Determines if speech recognition configuration can be edited.
Structured Parameters	Determines if structured parameter configuration can be edited.
System	Determines if system configuration can be edited.
System Parameters	Determines if system parameter configuration can be edited.
Voice Modules	Determines if voice module configuration can be edited.
Web Services Parameters	Determines if web service parameter configuration can be edited.
Collective Category	
Group	Description
Collective	Determines if the home site can be edited.
Peer Sites	Determines if the peer sites can be edited

Related Topics

[Workgroup: Administrative Rights](#)

Workgroup: Configuration Field Descriptions

[Workgroup: Members Field Descriptions](#)

[Workgroup: ACD Field Descriptions](#)

[Workgroup: Access Control Rights Field Descriptions](#)

[Workgroup: Security Rights Field Descriptions](#)

[Workgroup: Advanced Field Descriptions](#)

Workgroup: Access Control Rights

The Access Control Rights details tab contains configuration of rights to access administrative areas. These rights determine which items can be viewed and which ones can be modified (that is, perform CIC client functions such as pick up calls, listen in on calls, place calls on hold, change (valid) status, and so on). These rights can be set at the default user, role, user or workgroup level. Click the name of the details tab for field descriptions.

Notes:

- Administrative, access control and security rights can be inherited from the default user, roles, and workgroups. See Rights Inheritance for more information.
- If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

To complete the workgroup's access control rights information:

1. Click the [Access Control Rights](#) detail tab to display the details view.
2. Click **Browse for more rights**.



Access Control Rights Overview for Marketing

This is an overview of the effective access control rights for Marketing. Effective rights consist of rights that are set on Marketing and rights that are inherited.

[Browse for more rights](#)



3. Click a rights category to expand the list of specific rights:



Overview



User Management



Queues

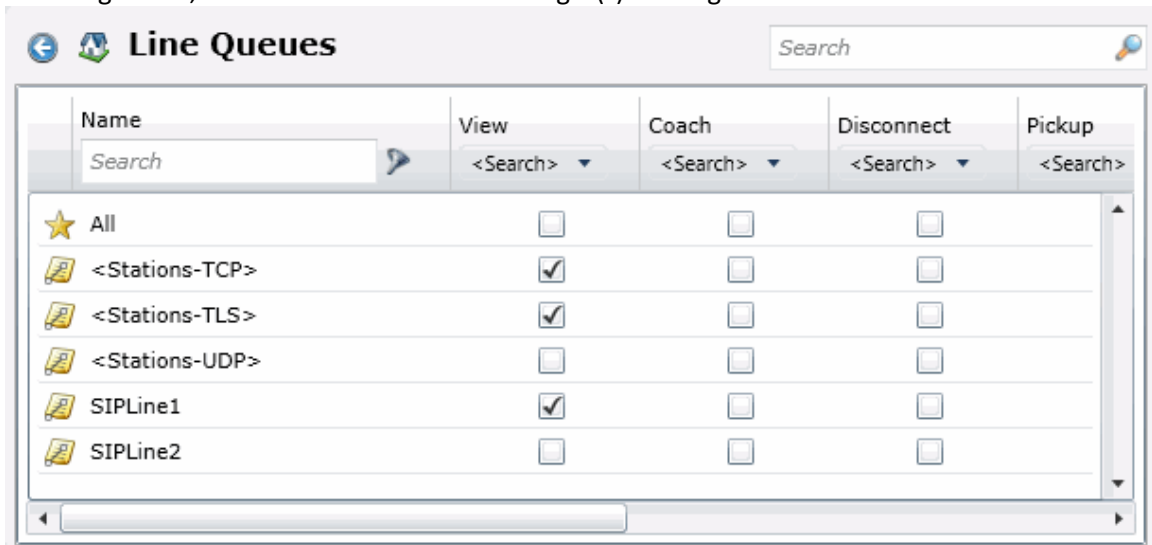


Hardware



Applications

- In the rights list, select the check box for the right(s) to assign.

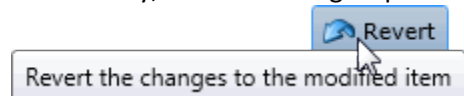


- To filter the rights list, click and select the filter type to apply to the list and type into the Name search text box.
 - Contains
 - Starts with
 - Matches whole word
- To display the rights assigned select **Yes** from the **Has right** drop-down box. Selecting **No** displays rights that are not assigned to the workgroup.
- Use the button to return to the previous detail view, or click to go to the Home category list.

- Save the new workgroup or modified workgroup.



If necessary, the new workgroup or changes made to an existing workgroup can be reverted.



Related Topics

Workgroup: Configuration

[Workgroup: Members](#)

[Workgroup: ACD](#)

[Workgroup: Administrative Rights](#)

[Workgroup: Security Rights](#)

[Workgroup: Advanced](#)

[Workgroup: Access Control Rights Field Descriptions](#)

Workgroup: Access Control Rights Field Descriptions

This topic contains the descriptions for each access control right in each category in the Access Control Rights details view under the View Workgroups master view.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see [About the Enhanced Interaction Administrator Change Log](#).

The Home page of the Administrative rights includes the following categories:

- [Overview](#) (all access control rights)
- [User Management](#)
- [Queues](#)
- [Hardware](#)
- [Applications](#)
- [Interaction Attendant Profiles](#)
- [System](#)

The following tables show the available administrator access control groups and the associated descriptions, by category:

User Management Category		
Group	Name	Description
Account Codes	View	Determines which account codes can be viewed in the CIC client dialog boxes. To assign account codes to incoming and outgoing calls the Account Code Verification security right must be assigned in addition to this access control right.
Client Buttons	View	Determines which custom buttons can be viewed on the Queue Control toolbar in the CIC client.
Directory Status Columns	View	Determines which status columns can be added to a directory view. These status columns include: Activated, Forward Number, Logged In, Notes, On Phone, Status, Status Summary, Time in Status, and Until.
Queue Columns	View	Determines which various queue columns in user, station, orbit or workgroup queues can be viewed.
Skills	View	Determines which IPA skills can be viewed and filtered in Process Designer.
Users	Change Status	Determines which users' status can be changed.
	View History	Determines which users' status history can be viewed.

Workgroups	View	Determines which workgroup directories can be viewed.
	View Statistics	CIC clients: View workgroups in the Workgroup Statistics view. Interaction Supervisor: View and select workgroup statistics.
Queues Category		
Group	Name	Description
Line Queues	View	Determines which line queues can be viewed.
	Coach	Determines which line queue's interactions can be coached.
	Disconnect	Determines which line queue's interactions can be disconnected.
	Pickup	Determines which line queue's interactions can be picked up.
	Transfer	Determines which line queue's interactions can be transfer.
	Join	Determines which line queue's interactions can be joined.
	Listen	Determines which line queue's interactions can be listened.
	Record	Determines which line queue's interactions can be recorded.
Station Queues	View	Determines which station queues interactions can be viewed.
	Search	Determines which station queues can be transfer targets in the Transfer dialog box.
	Disconnect	Determines which station queue's interactions can be disconnected.
	Hold	Determines which station queue's interactions can be held.
	Mute	Determines which station queue's interactions can be muted.
	Pickup	Determines which station queue's interactions can be picked up.

	Transfer	Determines which station queue's interactions can be transferred.
	Coach	Determines which station queue's interactions can be coached.
	Join	Determines which station queue's interactions can be joined.
	Listen	Determines which station queue's interactions can be listened.
	Record	Determines which station queue's interactions can be recorded.
User Queues	View	Determines which user queues can be viewed.
	Statistics	Determines which user queues' statistics can be viewed.
	Disconnect	Determines which user queue's interactions can be disconnected.
	Hold	Determines which user queue's interactions can be held.
	Mute	Determines which user queue's interactions can be muted.
	Pickup	Determines which user queue's interactions can be picked up.
	Transfer	Determines which user queue's interactions can be transferred.
	Coach	Determines which user queue's interactions can be coached.
	Join	Determines which user queue's interactions can be joined.
	Listen	Determines which user queue's interactions can be listened.
	Record	Determines which user queue's interactions can be recorded.
Workgroup Queues	View	<p>Determines which workgroup queues can be viewed.</p> <p>Note: The View Workgroup Queue rights are used as a filter for which workgroups are exposed to a user, when the user is using the Telephone User Interface (TUI) to send or forward voice mail and email messages.</p>

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	Search	Determines which workgroup queues can be transfer targets in the Transfer dialog box.
	Activate Others	Determines which workgroup queue's members can activate themselves.
	Activate Self	Determines which workgroup queue's members can activate others.
	Disconnect	Determines which workgroup queue's interactions can be disconnected.
	Pickup	Determines which workgroup queue's interactions can be picked up.
	Transfer	Determines which workgroup queue's interactions can be transferred
	Coach	Determines which workgroup queue's interactions can be coached.
	Join	Determines which workgroup queue's interactions can be joined.
	Listen	Determines which workgroup queue's interactions can be listen.
	Record	Determines which workgroup queue's interactions can be recorded.
Hardware Category		
Group	Name	Description
Stations	Login	Determines which stations can be logged in.
Station Groups	View	Determines which station groups can be viewed.
	Search	Determines which station groups can be transfer targets in the Transfer dialog box.
Application Category		
Group	Name	Description
Interaction Feedback Surveys	View	Determines which Interaction Feedback surveys can be viewed.
	Modify	Determines which Interaction Feedback surveys can be modified.
	View	Determines what processes in Process Monitor and Interaction Desktop can be searched for and viewed.

Interaction Process Automation Processes	Manage	Determines which processed can be searched, canceled, and retried in Process Monitor.
	Launch	<p>Determines which processes can be launched in Interaction Desktop.</p> <p>Note: A process must be published before it can be launched.</p>
Interaction Optimizer	Manage	Determines if the Interaction Optimizer Administration Module in the Interaction Center Business Manager (ICBM) application is accessible.
Interaction Optimizer Scheduling Units	view	Determines which Optimizer scheduling units can be viewed.
Interaction Conference Rooms	View	<p>Determines if a conference room is available for creating conferences.</p> <p>Conference rooms (defined telephone phone numbers/stations for use in Interaction Conference) can be restricted without this right. Without this right, users can still call into the room if they have a pin, but they can't make conferences that use it. By default, everyone who has access to Interaction Conference can use every room defined in CIC.</p>
Interaction Dialer Campaigns	View	Determines which campaigns can be viewed.
	Modify	Determines which campaigns can be modified.
	View Automatic Time Zone Mapping	Determines which campaign time zone configuration can be viewed.
	Modify automatic Time Zone Mapping	Determines which campaign time zone configuration can be modified.
	View Agentless Calling Mode	Determines which campaign calling mode configuration can be viewed.
	Modify Agentless Calling Mode	Determines which campaign calling mode configuration can be modified.

	View Line Settings	Determines which campaign line setting configuration can be viewed.
	Modify Line Settings	Determines which campaign line setting configuration can be modified.
	View Max Lines Per Campaign	Determines if the maximum number of campaign lines can be viewed.
	Modify Max Lines Per Campaign	Determines if the maximum number of campaign lines can be modified.
	View Statuses	Determines which campaign statuses can be viewed.
	Modify Statuses	Determines which campaign statuses can be modified.
Interaction Dialer Rule Sets	View Custom Handler	Determines which rule actions custom handlers can be viewed.
	Modify Custom Handler	Determines which rule actions custom handlers can be modified.
	View Event Log	Determines which rule actions event logs can be viewed.
	Modify Event Log	Determines which rule actions even logs can be modified.
Interaction Recorder Questionnaires	View	Determines which Questionnaire directories are available from the drop-down list in the Interaction Recorder Questionnaire container. If available from the list, a recording can be scored with that Questionnaire.
	Modify	Determines which Questionnaires can be modified.
Interaction Attendant Profiles Category		
Group	Name	Description
Interaction Attendant Email Profiles	View	Determines which Interaction Attendant email profiles can be viewed. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Search	Determines which Interaction Attendant email profiles are available in the "Transfer to" dialog box. Users who can view a profile have a lock on the

		profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Modify	Determines which Interaction Attendant email profiles can be modified. Users who can modify a profile can acquire a lock and edit/publish it.
Interaction Attendant Inbound Profiles	View	Determines which Interaction Attendant inbound profiles can be viewed. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Search	Determines which Interaction Attendant inbound profiles are available in the "Transfer to" dialog box. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Modify	Determines which Interaction Attendant inbound profiles can be modified. Users who can modify a profile can acquire a lock and edit/publish it.
Interaction Attendant Operator Profiles	View	Determines which Interaction Attendant operator profiles can be viewed. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Search	Determines which Interaction Attendant operator profiles are available in the "Transfer to" dialog box. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Modify	Determines which Interaction Attendant operator profiles can be modified. Users who can modify a profile can acquire a lock and edit/publish it.
Interaction Attendant Outbound Profiles	View	Determines which Interaction Attendant outbound profiles can be viewed. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Search	Determines which Interaction Attendant outbound profiles are available in the "Transfer to" dialog box. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Modify	Determines which Interaction Attendant outbound profiles can be modified. Users who can modify a profile can acquire a lock and edit/publish it.

System Category		
Group	Name	Description
General Directories	View	Determines which general directories can viewed.
IC Data Sources	View	Determines which data sources the user can configure and reference in database actions in Interaction Process Automation.
Interaction Reporter Reports	View	Determines which Interaction Reporter reports can be generated.
Layouts	View	Determines which layouts the user can view.
Misc Items	View	Allows a user to log in on behalf of another user.
Phone Number - Classifications	View	Determines which phone number classifications can be accessed, such as Blocked or Long Distance.
	Follow-me	Determines which phone number classifications can be used as follow-me numbers.
	Forward	Determines which phone number classifications can be used as forwarding numbers.
	TUI	Determines which phone number classifications can be used as forward numbers available through the menu when logged into voice mail. This access right prevents toll-fraud through the TUI.
Plug-ins	View	Determines which plug-ins can be added.
Positions	View	Determines which floor plan images (positions) the user can use in Interaction Supervisor iPad Edition.
Response Management	View	Allows access to chat features.
Status Messages	View	Determines which statuses can be selected from the My Status drop-down list or from the Set Status list when changing another user's status.
e-FAQs	View	Determines if e-FAQ configuration can be viewed.

Related Topics

[Workgroup: Access Control Rights](#)

[Workgroup: Members Field Descriptions](#)

[Workgroup: Members Field Descriptions](#)

[Workgroup: ACD Field Descriptions](#)

[Workgroup: Administrative Rights Field Descriptions](#)

[Workgroup: Security Rights Field Descriptions](#)

[Workgroup: Advanced Field Descriptions](#)

Workgroup: Security Rights

The Security Rights details tab contains configuration of rights to manage CIC client application functionality, such as buttons for recording, listening, and coaching. These rights can be set at the default user, role, user or workgroup level. Click the name of the details tab for field descriptions.

Notes:

- Administrative, access control and security rights can be inherited from the default user, roles, and workgroups. See Rights Inheritance for more information.
- If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

To complete the workgroup's security rights information:

1. Click the [Security Rights](#) detail tab to display the details view.
2. Click **Browse for more rights**.



Security Rights Overview for Marketing

This is an overview of the effective security rights for Marketing. Effective rights consist of rights that are set on Marketing and rights that are inherited.

[Browse for more rights](#)



3. Click a rights category to expand the list of specific rights:



 [Handlers](#)

 [Interaction Commands](#)

 [My Interactions](#)

 [Remote Access](#)

4. In the rights list, select the check box for the right to assign.

Name	Has right
<input type="text" value="Search"/>	<Search>
Account code verification	<input type="checkbox"/>
Can create speed dials	<input type="checkbox"/>
Conference calls	<input type="checkbox"/>
Customize client	<input type="checkbox"/>
Monitor columns	Inherited
Multiple calls	Inherited
Orbit queue	<input type="checkbox"/>

- To filter the rights list, click and select the filter type to apply to the list and type into the Name search text box.

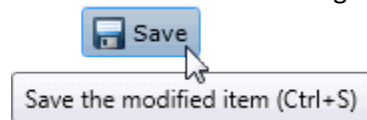
Contains

Starts with

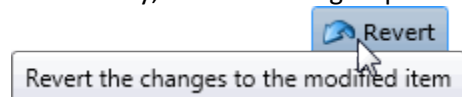
Matches whole word

- To display the rights assigned select **Yes** from the **Has right** drop-down box. Selecting **No** displays rights that are not assigned to the workgroup.
- Use the button to return to the previous detail view, or click to go to the Home category list.

5. Save the new workgroup or modified workgroup.



If necessary, the new workgroup or changes made to an existing workgroup can be reverted.



Related Topics

Workgroup: Configuration

[Workgroup: Members](#)

[Workgroup: ACD](#)

[Workgroup: Administrative Rights](#)

[Workgroup: Access Control Rights](#)

[Workgroup: Advanced](#)

[Workgroup: Security Rights Field Descriptions](#)

Workgroup: Security Rights Field Descriptions

This topic contains the descriptions for each security right in each category in the Security Rights details view under the View Workgroups master view.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

The following tables show the available security rights groups and the associated descriptions, by category:

User Management Category		
Group	Name	Description
Interaction Client	Account Code Verification	Allows users to assign account codes to incoming and outgoing interactions. See also the View Account Codes access control right.
	Can Create Speed Dials	Allows users to create speed dial views.
	Client Templates	Allows users to create and edit configuration templates for the CIC clients.
	Conference Calls	Allows users to create conference calls. See also the Conference Rooms access control right.
	Customize Client	Allows users to customize configuration settings in the CIC clients. It also allows users to add view, however, the ability to display certain views may require additional access control rights.
	Monitor Columns	Allows users to add the Lstns column and Recs column to a queue view. The Lstns column shows a speaker icon when someone is listening to the conversation. The Recs column shows a red dot icon to indicate that the conversation is being recorded.
	Multiple Calls	<p>Determines whether or not users are alerted when a new call arrives in the queue when already on a call. This only occurs on calls into lines that are marked "Allow Deferred Answer."</p> <p>If users do not have this right, or are already on a call and do not have call coverage set to forward calls when busy, then they are not alerted to the new call and it rolls to voice mail.</p> <p>This setting does not actually prevent multiple calls from being on a queue at the same time. It merely controls whether users are alerted or not. This setting applies only to My Interactions, not to calls to a logged-in station or default workstation.</p>

IC Server Manager Administrator Printable Help

	Orbit Queue	Allows users to park a call on orbit.
	Persistent Connections	Allows users the option of keeping remote telephone connected until you log off. Allows users to select Allow Persistent Connection when using a dynamic remote client connection.
	Personal Rules	Allows users to set up Personal Rules or create a Quick Call rule. These rules automatically perform specific actions when triggered by certain interactions
	Problem Reporter	Allows users to use the Problem Reporter option from the File menu in the CIC clients. This option allows users to send an email message containing problem information to a specified email recipient.
	Receive voice mail	If users have this right, callers are sent to voice mail when in a DND status (Gone Home, Out of the Office, or some other "not available" status) or when not answering phone. If users don't have this right, callers are returned to the Interaction Attendant main menu.
	Response Management	Allows users to use Response Management to incorporate a stored response such as a standard greeting or their company's support website address in e-mail messages, chats, callback requests, or text message.
	Status Notes	Allows users to create a Status Note when they set Status details for themselves or other users. Status Notes provide additional details about status, for example, the date an agent expects to return after vacation.
	User-defined Telephone Number on Remote Login	Allows users to enter a new Remote Number when logging in. See Dynamic Remote Client Connections.
	Workgroup Statistics	Allows users to enter a new Remote Number when logging in.
	Workgroups Profiles Tab	Allows users to display the Workgroup and Profiles view. This view lists workgroups and Attendant Profiles by name.
Handlers	Debug	Allows users to debug handlers published to the IC server. This applies only to users who have the Interaction Designer program and who are authorized to update production handlers or create new handlers on the IC telephony server. If

		this check box is not selected, users who attempt to debug handlers from Interaction Designer will see an appropriate error message.
	Manage	Allows users to add or remove handlers published to the IC server. A handler's status can be managed by someone running the Interaction Designer program on a workstation and using the Manage Handlers command on the Tools menu. If this option is not selected, users who attempt to manage handlers from Interaction Designer will see an appropriate error message.
	Publish	Allows users to publish new or updated handlers on the IC server. This applies only to users who have the Interaction Designer program and who are authorized to update production handlers or create new handlers on the IC telephony server. If this check box is not selected, users who attempt to publish handlers from Interaction Designer will see an appropriate error message.
Interaction Commands - (Restricts which commands and buttons are visible in the CIC clients) Note: These rights control the buttons in the CIC clients.	Assistance	Displays the Assistance button.
	Coach	Displays the Coach button.
	Disconnect	Displays the Disconnect button.
	Hold	Displays the Hold button.
	Join	Displays the Join button.
	Listen	Displays the Listen button.
	Mute	Displays the Mute button.
	Park	Displays the Park button.
	Pause	Displays the Pause button.
	Pickup	Displays the Pickup button.
	Private	Displays the Private button.
	Record	Displays the Record button.
	Secure Input	Displays the Secure Input button.
	Secure Recording Pause	Displays the Secure Record button.
	Transfer	Displays the Transfer button.
Voicemail	Displays the Voicemail button.	

IC Server Manager Administrator Printable Help

My Interactions	Coach Interactions	Allows users to coach interactions by adding themselves to other agents' interactions.
	Disconnect Interactions	Allows users to disconnect interactions using the CIC clienst instead of hanging up the telephone.
	Join Interactions	Allows users to join interactions, thus creating a conference call.
	Listen in on Interactions	Allows users to listen to calls. Both sides of a call can be heard.
	Mute Interactions	Allows users to disable the microphone on the telephone so that the other party or parties cannot hear what is being said during a call. It also enables users to reactivate the microphone.
	Park Interactions	Allows users to park calls on orbit. Note: Can only park calls appearing in My Interactions.
	Pause Interactions	Allows users to use the Pause button to control a recording session. The button can be clicked to pause the recording session. It can be clicked again to resume the recording session.
	Pickup Interactions	Allows users to pick up interactions.
	Private Interactions	Allows users to prevent other CIC Client users from recording or listening to their conversation.
	Put Interactions on Hold	Allows users to place selected interactions on hold.
	Record Interactions	Allows users to record interactions. The recordings are stored in files.
	Request Assistance from Supervisors	Allows users to request assistance from supervisors.
	Secure Recording Pause Interactions	Allows users to securely pause a recording to avoid recording sensitive information, such as Social Security numbers or credit card numbers, when recording interactions.
	Transfer Interactions	Allows users to transfer interactions.
	Transfer Interactions to Voicemail	Allows users to transfer calls to voice mail.
Remote Access	Email Access via TUI	Allow users to participate in e-mail interactions through the Telephone User Interface (TUI).
	Fax Access via TUI	Allows users to participate in fax interactions through the Telephone User Interface (TUI).

	Mobile Office User	Allows users access to the Mobile Office feature.
	Outlook TUI User (Requires Mobile Office User)	Allows users access to Microsoft Outlook through the Telephone User Interface (TUI).
	Voicemail Access via TUI	Allows users to participate in voice mail interactions through the Telephone User Interface (TUI).
User	Alert Programming	This right controls whether or not users can add, edit and remove alerts. When this right is assigned, context menus over statistic-based values in Supervisor provide the ability to add, edit and remove alerts. Without this right, users can only view alerts.
	Directory Administrator	Allows users to edit public directories that were created by other users.
	Follow Me	Allows users to call-forward multiple numbers, long distance numbers, and international numbers.
	Intercom Chat	Allows users to have intercom chats between other users on the same IC server.
	IP Phone Provisioning Administrator	Allows users to provision IP phones in the Managed IP Phones container.
	Remote Control	Allows users to remotely run applications and utilities that are Notifier clients, for example, IC System Manager and Switchover Control Panel.
	Require Forced Authorization Code	Requires users logged into station phones to enter a code that authorizes toll number calls.
	TIFF Faxes	Allows users to use TIFF (Tag Image File Format) for faxes.
	Trace Configuration	Allows users to configure tracing using IC System Manager or IC Trace utility.
	Video	Reserved for future use.
	View Interaction Details	Allows users to use Interaction Details view in the Interaction Tracker category. This view allows Interaction Supervisor users to search for interactions and examine the details.
Application Category		
Group	Name	Description

IC Server Manager Administrator Printable Help

Interaction Reporter	Interaction Reporter administrator	Allows users to configure all features and functions in Interaction Reporter.
Interaction Conference	Create and Modify All Conferences	Allows users to create conferences and to modify <i>all</i> conferences regardless of creator.
	Create and Modify Conferences	Allows users to create conferences, but to modify only those conferences they created.
Interaction Tracker	Add Individuals	Allows users to add individuals in Interaction Tracker Client.
	Add Organizations	Allows users to add organizations in Interaction Tracker Client.
	Delete Individuals	Allows users to delete individuals in Interaction Tracker Client.
	Delete Organization	Allows users to delete organizations in Interaction Tracker Client.
	Execute long-running Queries	Allows users to run more advanced queries against the Interaction Tracker database.
	Have Private Contacts	Allows users to create contacts that cannot be viewed by others.
	Interaction Tracker Administrator	Gives users the rights to access all pages in Interaction Tracker Client.
	Modify Individuals	Allows users to change or update individuals in Interaction Tracker Client.
	Modify Interactions	Allows users to change or update interactions in Interaction Tracker Client.
	Modify Organizations	Allows users to change or update organizations in Interaction Tracker Client.
	Related Interactions Page	Allows users to view the page that shows related interactions in Interaction Tracker Client.
	View Other People's Private Interactions	Allows users to view private interactions of other users in Interaction Tracker Client.
Interaction Dialer	Login Campaign	Allows users to log in to a campaign.
	Modify General	Allows users to modify the general campaign settings page.
	View General	Allows users to view the general campaign settings page.

Modify Preview Call Behavior	Allows users to modify the preview call behavior on the miscellaneous campaign configuration page.
View Preview Call Behavior	Allows users to view the preview call behavior on the miscellaneous campaign configuration page.
Modify Outbound Servers	Allows users to modify the outbound server settings on the campaign configuration page.
View Outbound Servers	Allows users to view the outbound server settings on the campaign configuration page.
Modify Change Auditing	Allows users to modify the auditing behavior on the miscellaneous campaign configuration page.
View Change Auditing	Allows users to view the auditing behavior on the miscellaneous campaign configuration page.
Modify Phone Number Types	Allows users to modify the phone number types on the phone number types page in campaign configuration.
View Phone Number Types	Allows users to view the phone number types on the phone number types page in campaign configuration.
Modify HTTP Server	Allows users to modify the campaign server settings.
View HTTP Server	Allows users to view the campaign server settings.
View/Modify Campaign Agentless Calling Type	Determines whether users can select Agentless dialing mode when setting the Calling mode for a Campaign.
View/Modify Campaign Automatic Zone Mapping	Grants right to check "Automatically map time zones and all child options in a Campaign object. Without this right, options are disabled.
View/Modify Line Settings	Set options in the Dialer Line Information group box for a Campaign. These options configure Dialer to adhere strictly to CIC's Dial Plan or to use one specific line group for campaign calls.
View/Modify Campaign Maximum Lines	Determines whether the <i>Maximum Lines per Campaign</i> setting on the Basic Configuration tab of a Campaign is enabled or not.
View/Modify Custom Handler Actions	Grants right to run the Dialer_RuleActionEvent handler by setting up a Rule Action or Policy Behavior. A user who does not have this right cannot modify settings that configure a Run Handler rule action.

IC Server Manager Administrator Printable Help

	View/Modify Database Connections	Grants right to view and modify Database Connections in Dialer Manager. When this right is not granted, Database Connection options are disabled.
	View/Modify DNC Sources	Grants right to view and modify the DNC Sources view in Dialer Manger. A DNC Source provides a list of telephone numbers that should not be dialed. When this right is not granted, DNC options are disabled.
	View/Modify Time Zone Map Data	Grants right to view and modify the Timezone Map Data view in Dialer Manger. A time zone map is a file that associates the initial digits of a phone number (area code and exchange in North America, for example) with a time zone. When this right is not granted, options on the view are disabled.
	View/Modify Event Log	Grants right to configure Rule Set Actions or Policy Set Behaviors that write an event log entry.
	View/Modify Contact List Data Query	Determines whether or not the Data Query tab of a Contact List object is visible or not. The Data Query tab queries the contact list to display a list of results in a data grid. Query results can be saved as filters. Users may also apply actions to records displayed in the grid, and commit changes back to the database.
	View/Modify Campaign Status	Enables the Campaign Execution Panel for a campaign entry. Users who have this right can control the running state of a campaign, whether it runs in accordance with a schedule, or in a manually operated state. Users can also recycle the contact list, recycle the campaign, and test to ensure that campaign settings are valid. When not granted, these controls are disabled.
	Lock policy sets	Enables the user to lock a Dialer policy object, which prevents it from being modified, removed, or unlocked by anyone who does not have Master Administrator rights. Once a policy is locked, users who are not Master Administrators can view the policy, but they cannot remove or edit it until a Master Administrator removes the lock. Locked policies can be assigned to a campaign, but they cannot be removed from a campaign without Master Administrator rights.

Interaction Optimizer	Allow Agent Preferences	Allows users to set schedule preferences in Interaction Desktop.
	Allow agent to do schedule bidding	Allows user to set or his her schedule preferences in Interaction Desktop.
	Allow agent to see their rank	Allows user to view the ranking of the user's potential schedules in order from most desired to least desired. For example, "Your rank is 22."
	Allow agent to see their relative rank	Allows user to view the relative ranking of the user's potential schedules as compared to other agents' rankings. For example, "Your rank is 22 out of 45 for this bid."
	Delete scheduling units	Allows user to delete scheduling units.
	Create scheduling units	Allows user to add scheduling units.
	Can view Optimizer Day Classifications	Allows user to view day classifications in Optimizer.
	Can modify Optimizer Day Classifications	Allows user to edit day classifications in Optimizer.
	Can create Optimizer Day Classifications	Allows user to add day classifications in Optimizer.
	Can delete Optimizer Day Classifications	Allows user to delete day classifications in Optimizer.
	Can View Activity Codes	Allows user to view activity codes.
	Can Modify Activity Codes	Allows user to edit activity codes.
	Can Delete Activity Codes	Allows user to delete activity codes.
	Can View Activity Type Mapping	Allows user to view activity type mappings.
	Can submit time off	Allows user to request time off.
Interaction Recorder Policy	Create and Delete Questionnaire Directories	Allows users to create or delete questionnaire directories, and also create or delete rankings.
	Policy Editor	Allows users to access Policy Editor in Interaction Recorder Client.
	Override Finished Scorecards	Allows users to modify finished scorecards for questionnaires in questionnaire directories that can be viewed. A scorecard is considered finished when "Finish" is clicked on the scoring dialog box. Normally, a finished scorecard cannot be change.

		Note: Overriding a finished scorecard can affect reports.
Interaction Tracker	Add individuals	Allows user to add individuals in Interaction Tracker.
	Add organizations	Allows user to add organization in Interaction Tracker.
	Delete individuals	Allows user to delete individuals in Interaction Tracker.
	Have private contacts	Allows user to have private contacts in Interaction Tracker.
	Interaction Tracker administrator	Allows user to access and configure all of the features and functions in Interaction Tracker.
	Modify individuals	Allows user to edit individuals in Interaction Tracker.
	Modify interactions	Allows user to edit interactions in Interaction Tracker.
	Modify organizations	Allows user to edit organizations in Interaction Tracker.
	Related Interactions page	Allows user to view the Related Interactions page in Interaction Tracker.
	View other people's private Interactions	Allows user to view interactions that other users have designated as "private." The user sees these interaction in the Related Items view and in the Find Interaction dialog box. Users designate interactions as "private" to prevent other users from recording or listening to them.

Related Topics

[Workgroup: Security Rights](#)

Workgroup: Configuration Field Descriptions

[Workgroup: Members Field Descriptions](#)

[Workgroup: ACD Field Descriptions](#)

[Workgroup: Administrative Rights Field Descriptions](#)

[Workgroup: Access Control Rights Field Descriptions](#)

[Workgroup: Advanced Field Descriptions](#)

Workgroups: Advanced

The Advanced tab information for operator target, non-ACD actions, parked interactions, phonetic spellings, custom attributes, and history. Click the name of the details tab for field descriptions.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

To complete the users' advanced information:

1. Click the [Advanced](#) detail tab to display the details view.

2. Enter the number for **Operator target**:

Operator target:

3. Click Non-ACD Actions section expander to display (or hide) the non-ACD actions section's contents, and complete the following information:

- To set a specific timeout for incoming interactions, select the **Override the timeout default for incoming interactions (minimum 7 seconds)** check box, and use the up and down arrows or type in the box to set the timeout.

- To specify a specific action to start when a non-ACD Interaction enters an alerting state, select the **Action**. You can filter the list by typing in the drop-down box. When an action is not specified, a message is displayed:

- To specify a specific action to start when a non-ACD Interaction moves to the disconnect state, select the **Action**. You can filter the list by typing in the drop-down box.


4. Click Parked Actions section expander to display (or hide) the parked actions section's contents, and complete the following information:

- To set a specific timeout for any parked interactions (calls, chats, emails, generic objects), select the **Override the timeout default (minutes)** check box for the specific interaction, and use the up and down arrows or type in the box to set the timeout.

- To transfer a parked interaction after the timeout, select the **Transfer to this extension after a timeout** check box for the specific interaction, and enter the extension.



5. Click Phonetic Spellings section expander to display (or hide) the phonetic spellings section's contents, and complete the following information:



IC Server Manager Administrator Printable Help

- Type the TTS phonetic spelling for the workgroup in the **Text to Speech** field;
 Enter alternate phonetic spellings of the workgroup name for TTS and ASR.

Text To Speech:

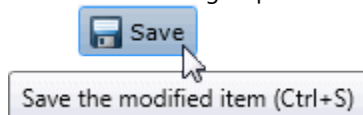
Automatic Speech Recognition spellings:

Sails	
Sails	

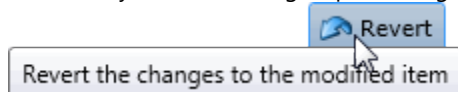
- Type an ASR spelling for the workgroup, and click . You can add multiple spellings.
6. Click Custom Attributes section expander to display (or hide) the custom attributes section's contents, and complete the following information:
 - To create a custom attribute, click  and type an attribute name. You must also enter a value for the new attribute.

Fax	5551212
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7. Click History section expander to display (or hide) the history section's contents, and complete the following information:
 - View the **Created** and **Modified** dates for this workgroup.
 - Type or view information in the **Notes** field for the workgroup.
8. Save the new workgroup or modified workgroup.



If necessary, the new workgroup or changes made to an existing workgroup can be reverted.



Related Topics

Workgroup: Configuration

[Workgroup: Members](#)

[Workgroup: ACD](#)

[Workgroup: Administrative Rights](#)

[Workgroup: Access Control Rights](#)

[Workgroup: Security Rights](#)

[Workgroup: Advanced Field Descriptions](#)

Workgroup: Advanced Field Descriptions

This topic contains the descriptions for each field in the Advanced details view under the View Workgroups master view.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see About the Enhanced Interaction Administrator Change Log.

General

Can receive faxes (requires mailbox)

If you configure a workgroup to receive faxes, then callers to that DID hear "Welcome to CIC", then ring-back while the handler listens for a fax. The handler then places the call on the queue. If you do not configure a workgroup to receive faxes, the call goes directly to that workgroup queue.

Use TIFF for faxes to this workgroup

This option allows the workgroup to use Tagged Image File Format for faxes.

Operator Target

In CIC, a user can be defined to answer another user's calls. When a CIC client sends a call to voice mail, the caller has the option to press zero to reach an operator. When a caller presses zero to exit voice mail, the number or extension can be set for where to send calls. For example, such calls may be routed to a specific administrative assistant or another company representative who can handle the calls.

A profile phone number can also be set as an **Operator Target**. By using a profile phone number, the call goes to the Interaction Attendant profile matching the DNIS from the profile phone number, and no operator is involved in the call.

Note: Operator target cannot be set through the telephone user interface, It must be set through a CIC client or by an administrator.

Non-ACD Actions

The Non-ACD Actions section includes:

Override the timeout default for incoming Interactions (minimum 7 seconds)

The timeout is the amount of time an incoming interaction rings at the CIC client station before the interaction quits alerting and proceeds to the next step in the handler (for example, goes to voice mail or changes an ACD agent's status to ACD-Agent not answering and offers the interaction to another agent). The default value is 30 seconds. Change this value by using the up and down arrows to adjust the number (7 is the minimum) of seconds, minutes or hours.

Start this Action when a non-ACD Interaction enters an alerting state

Actions can be thought of as a direct communications link between two application programs. A CIC client can function with other applications as a client and a server application. The specific action selected here, happens when a non-ACD interaction enters an alerting state on this workgroup's queue. Actions available are actions that have been configured in Interaction Administrator.

Start this Action when a non-ACD Interactions moves to the disconnection state

Actions can be thought of as a direct communications link between two application programs. A CIC client can function with other applications as a client and a server application. The specific action selected here, happens when a non-ACD interaction enters a disconnected state on this workgroup's queue. Actions available are actions that have been configured in Interaction Administrator.

Parked Interactions

Use this section to set the maximum time that parked **calls, chats, emails, or generic objects** for the workgroup will wait on silent hold, and to specify the extension that interaction will be transferred to when the time has elapsed. If the time is not set here, the default time is used. If an extension is not specified here, the system IVR is used.

Override the timeout default (minutes)

Set the maximum time in minutes here that a parked call, chat, email or generic object should wait before transfer to the specified extension.

Transfer to this extension after a timeout

Set the destination extension here for a parked call, call, chat, email, or generic object that has reached its timeout.

Phonetic Spellings

These settings define alternate (phonetic) spellings of the workgroup name for Text To Speech (TTS) and Automatic Speech Recognition (ASR). Phonetic spelling options can also be set at the user level.

Text To Speech

The TTS spelling should be a single-valued attribute. You spell the name like it sounds. For example, if a workgroup name is spelled "LevelOneSales", but it is pronounced "Sales", you would enter "Sales". If no attribute is entered, the system default is used.

Automatic Speech Recognition spellings

The workgroup can have multiple spellings for ASR. The ASR spelling attribute should be a multi-valued attribute.

The ASR phonetic spelling values are used by the "Reco Create Company Directory Grammar". This can be very useful to add nick names or different spellings of a workgroup name. Any valid grammar token may be specified in this list. For example, assume a workgroup called "Sales". That's the name as known to the CIC system and used by default for the company directory grammar. However, you want to add additional spellings to increase the coverage of the grammar by adding the following alternate spellings:

- Sails
- Sells

Note: Be careful not to add too many alternate spellings without actually knowing whether the spellings will be used by callers. If the grammar coverage becomes too broad, in particular if the company directory already contains a lot of similarly sounding names, the recognitions quality will be degraded because of the ambiguity.

Custom Attributes

Use customized attributes to reference other variables and settings through the IceLib interface. When adding a new attribute, use a unique name, otherwise an existing attribute with the same name will be overwritten. Click **Edit** to change the value of an existing custom attribute, or **Delete** to delete an existing custom attribute.

History

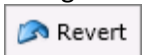
History provides a way to manually document configuration changes and when they occurred. Changes made in Interaction Administrator are also automatically logged in the Interaction Administrator Change Notification Log (Log ID 7). Later, authorized users can run reports against this log to summarize all configuration changes.


Created

This date is automatically set when the user creates the initial configuration for this workgroup. If the workgroup was initially created by the CIC setup, the date could be blank.

Modified

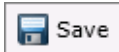
This date is automatically updated each time the user clicks the OK button, presumably after making changes to the workgroup configuration. To avoid updating this date, exit the property sheet by clicking



Note: If you click , none of the changes made to this workgroup since the changes were last saved are preserved.

Notes

Type notes about configuration settings and changes. If you change the configuration and click



, the **Last Modified** date is updated.

You must manually enter the date beside each entry in the **Notes** field to identify the date of each note.

Related Topics

[Workgroup: Advanced](#)

Workgroup: Configuration Field Descriptions

[Workgroup: Members Field Descriptions](#)

[Workgroup: ACD Field Descriptions](#)

[Workgroup: Administrative Rights Field Descriptions](#)

[Workgroup: Access Control Rights Field Descriptions](#)

[Workgroup: Security Rights Field Descriptions](#)

Roles

A Role is a way to define a special group of people that require specific CIC client rights or Interaction Administrator access. Users and members of workgroups can be assigned to a role, and inherit the role's security rights. Users and workgroups can be assigned multiple roles.

The **View Roles** page displays roles in a list in the master view, and displays details of the currently selected role in the details view. You can take actions on the roles in the list view, such as edit, delete or copy, and you can add a new role. You can change the way the list is displayed, such as change visible columns, sort by column, and filter.

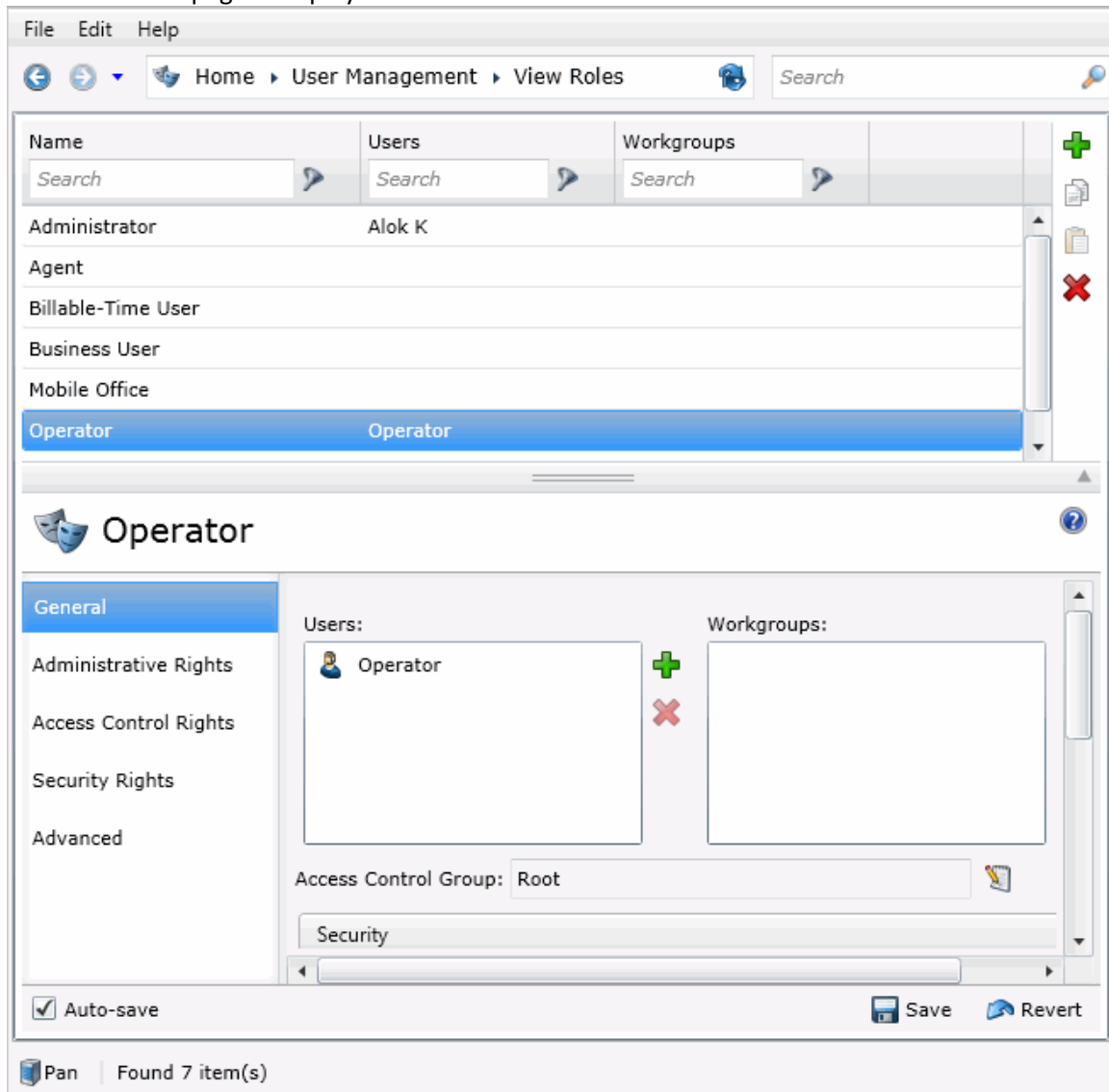
To view roles:

1. Click the **View Roles** action under the **User Management** category:



...or Click **View Roles** in the breadcrumbs if available.

2. The **View Roles** page is displayed.



3. The details of the selected role are displayed in the details view.

Related Topics:

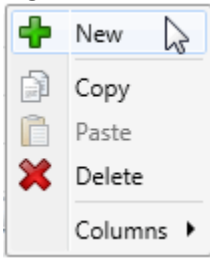
[Add a Role](#)

Add a Role

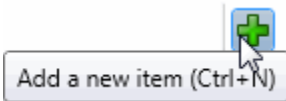
You can add a new role in Interaction Administrator Web Edition. The role settings are configured in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

To add a role:

1. Right-click in the master view area and select **New**:



...Or click the **New** button in the master view toolbar:



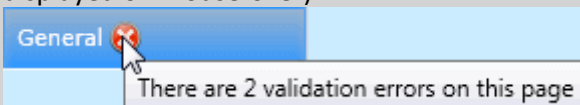
The **Add New Role** appears in the details view:

The 'Add New Role' configuration form is shown. It has a 'Name' field containing 'New Item'. Below are two empty list boxes for 'Users' and 'Workgroups', each with a green plus icon and a red X icon. Below these is an 'Access Control Group' field with a red border and a document icon. At the bottom are two tabs: 'Security' and 'Other', with a scrollbar below them.

2. Complete the role configuration in the five details tabs. The links below open the topics containing procedures for completing each details tabs configuration:

- [General](#)
- [Administrative Rights](#)
- [Access Control Rights](#)
- [Security Rights](#)
- [Advanced](#)

3. **Note:** To save a new role, all required information must be entered. Details tabs containing incomplete or erroneous information, are shown with an error indicator (error details are displayed on mouse-over):



Related Topics

[Roles: General](#)

[Roles: Administrative Rights](#)

[Roles: Access Control Rights](#)

[Roles: Security Rights](#)


[Roles: Advanced](#)

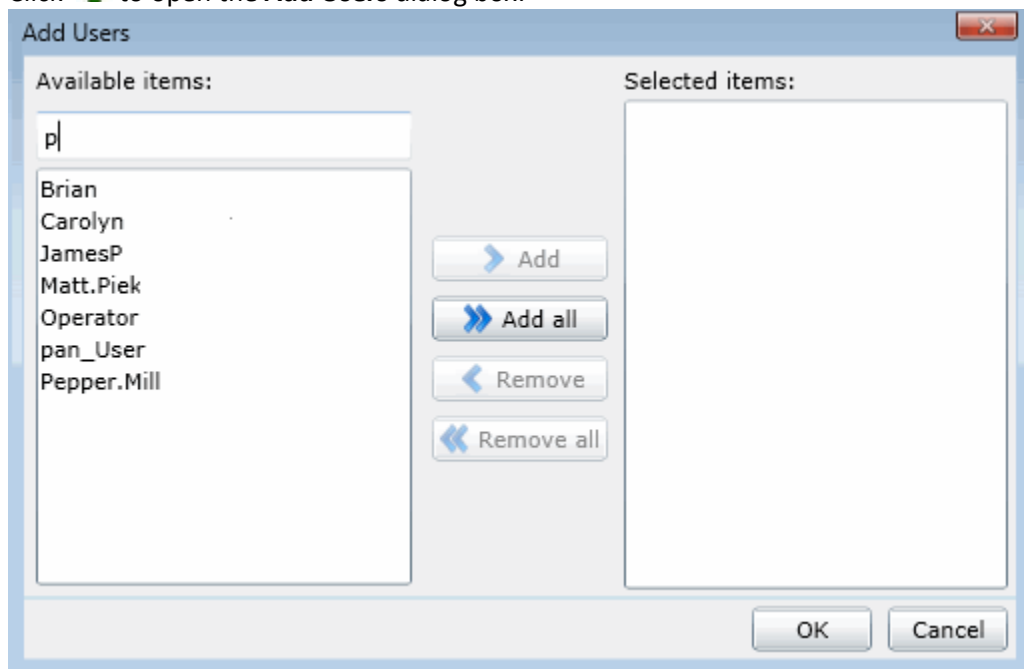
Roles: General

The General details tab contains name, membership, access control group, security password policy, and CIC client configuration for the role. Click the name of the details tab for field descriptions.

To complete the role's general information:

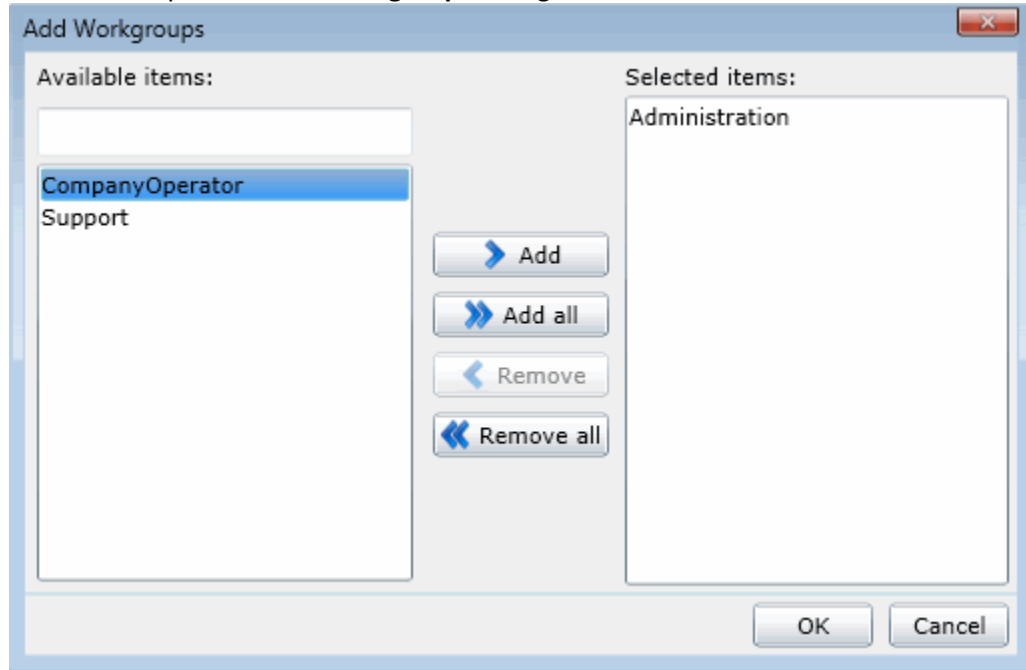
1. Click the [General](#) details tab to display the details view.
2. Complete the following information in the first section:

- Type the **Name**.
- Click  to open the **Add Users** dialog box:



Select one or more users in the **Available items** list, and click **Add** to add the user(s) to the **Selected items** list. You can also click **Add all** to add all users. To filter the list of users, type in the filter field above the list.

- Click  to open the **Add Workgroups** dialog box:



Select one or more Workgroups in the **Available items** list, and click **Add** to add the workgroup(s) to the **Selected items** list. You can also click **Add all** to add all workgroups. To filter the list of workgroups, type in the filter field above the list.

- To display the access control groups membership available, click the icon.



Change the Access Control Group assignment

and select the group from the **Access Control Group** dialog box.



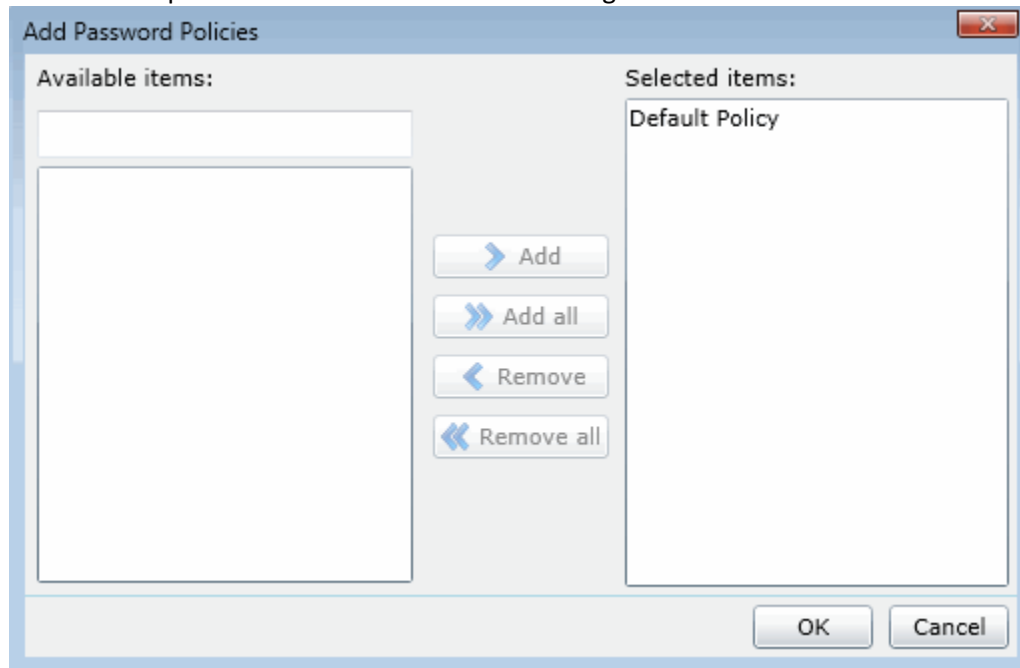
3. Click the Security section expander to display (or hide) the security section's contents, and complete the following information:
 - If the role is a master administrator, select the **Is a master administrator rights** check box.

Note: Only a master administrator can select this check box. See the field descriptions for more information.

- To allow the role to edit [administrator rights](#), select the **Can edit administrative rights** check box.
 - To allow the role to edit [access control rights](#), select the **Can edit access control rights** check box.
4. Click the Other section expander to display (or hide) the other section's contents, and complete the following information:
 - To specify a specific a client configuration template for the role, select the template from the drop-down box or type in the box. When a template is not specified, a message is displayed:

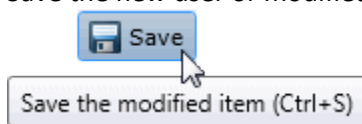
No Client Configuration Template selected ▾

- Click **+** to open the **Add Password Policies** dialog box:

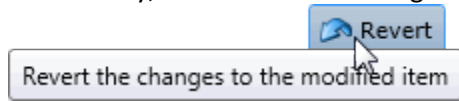


Select one or more Password Policies in the **Available items** list, and click **Add** to add the policy(s) to the **Selected items** list. You can also click **Add all** to add all policies. To filter the list of policies, type in the filter field above the list.

5. Save the new user or modified role.



If necessary, the new role or changes made to an existing role can be reverted.



Related Topics

[Add a Role](#)

[Roles: Administrative Rights](#)

[Roles: Access Control Rights](#)

[Roles: Security Rights](#)

[Roles: Advanced](#)

Roles: General Field Descriptions

This topic contains the descriptions for each field in the **General** details view under the **View Roles** page.

Users

When a user is added to a role, the user takes on the associated permissions. The default roles are:

- Administrator
- Supervisor
- Agent
- Operator
- Business User
- Billable-Time User
- Mobile Office

Workgroups

A workgroup is a logical group of users (for example, departments) that can function as a group in the CIC system. A workgroup can have an extension that enables all members of the workgroup to receive calls notifying the workgroup. In addition, a workgroup can receive regular calls and ACD calls to specific workgroups and users.

Access Control Groups

An access control group (ACG) is a group of administrative rights. When an ACG is added to the role, the users assigned to the role take on those ACG's rights. The role can be assigned to only one ACG.

Note: Access Control Groups appear if they have been configured in your environment. If Access Control Groups have not been configured, this field is not displayed.

Security

This section allows administrative and access control settings to be enabled or disabled.

Is a Master Administrator

Select this check box to give master rights to the currently selected role. Users assigned this role have master administrator rights to add, remove or change all security rights. When this check box is selected, all settings on the Administrator Access page are implicitly selected. Clear this check box to remove master administrator rights.

Anyone having master administrator rights can view and change everything in Interaction Administrator, and assign or remove all levels of rights for any other CIC account, including others with master administrator rights. All security pages (especially Administrator Access and Access Control) for the Default User, User, Workgroup, and Role containers are visible to master administrators. This is not the case for other accounts without master administrator rights.

Master administrators can grant individual users a range of access rights, which enable them to manage other CIC configuration resources. These rights can be very minimal, such as a user allowed to run Interaction Administrator to change only their own user and station configuration, or perhaps the user and station configurations for the members of a workgroup. In contrast, a master administrator can grant another user rights to create, modify, or delete any other CIC configuration resource in Interaction Administrator, including giving other users a subset of their own administration rights. Master administrators also control the appearance of the [Access Control](#) and [Administrator Access](#) pages for select users (other users do not have the option to control these pages).

Can Edit Administrative Rights

Select this check box to enable [administrative access rights](#) edits for this role. This disables access control rights edits for the role, and when clicking the [Access Control](#) button, an error message is displayed.

Can Edit Access Control Rights

Select this check box to enable [access control rights](#) edits for this role. This disables administrative access rights edits for the role, and when clicking the [Administrator Access](#) button, an error message is displayed.

Password Policies

A password policy is a set of rights. When a password policy is added to a workgroup or role, the workgroup or role takes on those rights. If a user is a member of that workgroup or assigned that role, the user automatically inherits the password Policy assigned to the workgroup or role. The inherited password policies are displayed in the list on the right. Policies added to the user, but are not inherited are displayed in (and can be added to) the list on the left.

Related Topics

[Roles: General](#)

[Roles: Administrative Rights Field Descriptions](#)

[Roles: Access Control Rights Field Descriptions](#)

[Roles: Security Rights Field Descriptions](#)

[Roles: Advanced Field Descriptions](#)

Roles: Administrative Rights

The Administrative Rights details tab contains configuration of rights to access administrative areas. These options allow access to a sub-set of rights available with the Master Administrator right. These rights control what objects are shown and what objects can be edited in Interaction Administrator. The access can be set at the default user, role, user or workgroup level. Click the name of the details tab for field descriptions.

Note: Administrative, access control and security rights can be inherited from the default user, roles, and workgroups. See Rights Inheritance for more information.

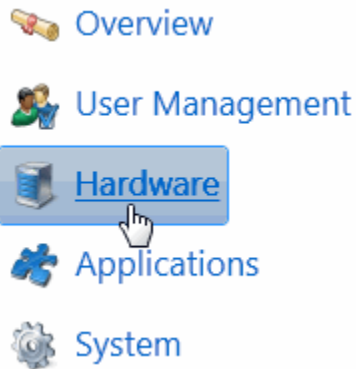
This topic provides instruction for role administrative rights.

To complete the role's administrative rights information:

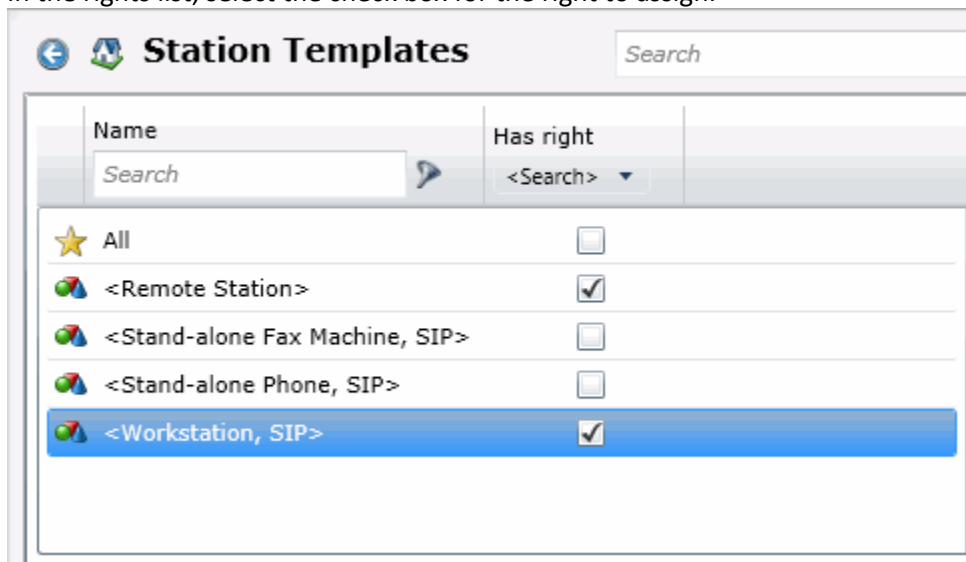
1. Click the [Administrative Rights](#) detail tab to display the details view.
2. Click **Browse for more rights**.
Supervisor is not assigned any administrator access rights.


[Browse for more rights](#)

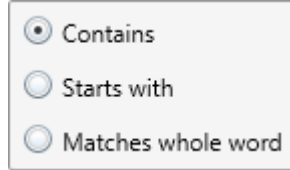
3. Click a rights category to expand the list of specific rights:





4. In the rights list, select the check box for the right to assign.



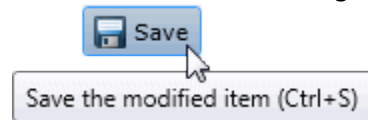
- To filter the rights list, click  and select the filter type to apply to the list and type into the Name search text box.



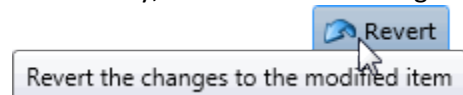
A dialog box with three radio button options: 'Contains' (selected), 'Starts with', and 'Matches whole word'.

- To display the rights assigned select **Yes** from the **Has right** drop-down box. Selecting **No** displays rights that are not assigned to the role.
- Use the  button to return to the previous detail view, or click  to go to the Home category list.

5. Save the new workgroup or modified role.



If necessary, the new role or changes made to an existing role can be reverted.



Example

If members of role need access to edit a queue column, do the following:

1. Click **User Management** in the **Category** list.
2. Click **Queue Columns**.
3. Click **View Rights**.
4. Select the *[All] check box to enable the role members to edit all queue columns.
5. Click **Save**.

To assign the same rights to the default user, user, or workgroup, follow the same procedure.

Related Topics

[Add a Role](#)

[Roles: General](#)

[Roles: Administrative Rights Field Descriptions](#)

[Roles: Access Control Rights](#)

[Roles: Security Rights](#)

[Roles: Advanced](#)

Roles: Administrative Rights Field Descriptions

This topic contains the descriptions for each administrative right in each category in the Administrative details view under the View Roles master view.

The Home page of the Administrative rights includes the following categories:

- Overview (all administrative rights)
- [User Management](#)
- [Hardware](#)
- [Applications](#)
- [System](#)
- [Collective](#)

The following tables show the available administrator rights groups and the associated descriptions, by category:

User Management Category	
Group	Description
Account Codes	Determines if account codes can be edited.
Actions	Determines if actions configuration can be edited.
Client Buttons	Determines if client buttons can be edited.
Client Configuration	Determines if client configuration can be edited.
Client Configuration Templates	Determines if client configuration templates can be edited.
Default User	Determines if the default user can be edited.
Password Policies	Determines if password policies can be edited.
Password Policies Configuration	Determines if password policy configuration can be edited.
Queue Columns	Determines if queue columns can be edited.
Response Management	Determines if response management configuration can be edited.
Roles	Determines if roles can be edited.
Schedules	Determines if schedules configuration can be edited.
Secure Input Forms	Determines if secure input forms configuration can be edited.
Skills	Determines if skills can be edited.
Status Messages	Determines if status message configuration can be edited.
Users	Determines if users can be edited.
Wrap-up Codes	Determines if wrap-up codes can be edited.
Wrap-up Categories	Determines if wrap-up categories can be edited.

Workgroups	Determines if workgroups can be edited.
Hardware Category	
Group	Description
Default Station	Determines if default station configuration can be edited.
Stations	Determines if station configuration can be edited.
Station Groups	Determines if station group configuration can be edited.
Station Templates	Determines if station template configuration can be edited.
Default IP Phone	Determines if default IP phone configuration can be edited.
IP Phones	Determines if IP phone configuration can be edited.
IP Phone Registration Groups	Determines if IP phone registration group configuration can be edited.
IP Phone Templates	Determines if IP phone template configuration can be edited.
IP Phone Ring Sets	Determines if IP phone ring set configuration can be edited.
Applications Category	
Group	Description
Interaction Feedback	Determines if Interaction Feedback configuration can be edited.
Interaction Process Automation	Determines if Interaction Process Automation configuration can be edited.
Interaction Conference	Determines if Interaction Conference configuration can be edited.
Interaction Conference Rooms	Determines if Interaction Conference Rooms configuration can be edited.
Interaction Optimizer Activity Types	Determines if activity types configuration can be edited.
Interaction Optimizer Advanced Configuration	Determines if advanced configuration can be edited.
Interaction Optimizer Agents	Determines if agent configuration can be edited.
Interaction Optimizer Day Classifications	Determines if day classification configuration can be edited.
Interaction Optimizer Forecasts and Schedules	Determines if forecasts and schedules configuration can be edited.
Interaction Optimizer Scheduling Units	Determines if scheduling unit configuration can be edited.
Interaction Dialer Call Lists	Determines if Dialer call list configuration can be edited.

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Interaction Dialer Campaigns	Determines if Dialer campaigns configuration can be edited.
Interaction Dialer Configuration	Determines if Dialer configuration can be edited.
Interaction Dialer Policy Sets	Determines if Dialer policy sets configuration can be edited.
Interaction Dialer Rule Sets	Determines if Dialer rule sets configuration can be edited.
Interaction Dialer Schedules	Determines if Dialer schedules configuration can be edited.
Interaction Dialer Scripts	Determines if Dialer scripts configuration can be edited.
Interaction Dialer Skill Sets	Determines if Dialer skill sets configuration can be edited.
Interaction Dialer Stage Sets	Determines if Dialer stage sets configuration can be edited.
Interaction Dialer Zone Sets	Determines if Dialer zone sets configuration can be edited.
Interaction Analyzer Keyword Sets	Determines which Interaction Analyzer Keyword Sets can be edited.
Interaction Recorder	Determines if Interaction Recorder configuration can be edited.
Interaction Tracker	Determines if Interaction Tracker configuration can be edited.
System Category	
Group	Description
Accumulators	Determines if accumulator configuration can be edited.
Audio Sources	Determines if audio source configuration can be edited.
Contact Data Manager	Determines if contact data manager configuration can be edited.
Contact List Sources	Determines if contact list source configuration can be edited.
Default Location	Determines if default location configuration can be edited.
e-FAQ	Determines if e-FAQ configuration can be edited.
Fax	Determines if fax configuration can be edited.
Fax Groups	Determines if fax groups configuration can be edited.
Handlers	Determines if handler configuration can be edited.
Historical Reports	Determines if historical reports configuration can be edited.
IC Data Sources	Determines if CIC data source configuration can be edited.
Initialization Functions	Determines if initialization configuration can be edited.
Interaction Processor Tables	Determines if Interaction Processor tables can be edited.
License Allocation	Determines if license allocation configuration can be edited.

Lines	Determines if line configuration can be edited.
Line Groups	Determines if line group configuration can be edited.
Locations	Determines if location configuration can be edited.
Log Retrieval Assistant	Determines if log retrieval assistant configuration can be edited.
Lync	Determines if Lync configuration can be edited.
MRCP	Determines if MRCP configuration can be edited.
Mail	Determines if mail configuration can be edited.
Media Servers	Determines if media servers configuration can be edited.
Lync Active Directories	Determines if Lync Active Directories configuration can be edited.
Lync Status Messages	Determines if Lync Status Messages configuration can be edited.
Paging Carriers	Determines if paging carrier configuration can be edited.
Phone Numbers	Determines if SIP Proxies configuration can be edited.
Report Logs	Determines if report logs configuration can be edited.
Servers	Determines if server configuration can be edited.
Server Parameters	Determines if server parameter configuration can be edited.
Session Managers	Determines if session managers configuration can be edited.
SIP Proxies	Determines if SIP proxies configuration can be edited.
SMS	Determines if SMS configuration can be edited.
SMS Broker	Determines if SMS broker configuration can be edited.
Speech Recognition	Determines if speech recognition configuration can be edited.
Structured Parameters	Determines if structured parameter configuration can be edited.
System	Determines if system configuration can be edited.
System Parameters	Determines if system parameter configuration can be edited.
Voice Modules	Determines if voice module configuration can be edited.
Web Services Parameters	Determines if web service parameter configuration can be edited.
Collective Category	
Group	Description
Collective	Determines if the home site can be edited.
Peer Sites	Determines if the peer sites can be edited.

Related Topics

[Roles: Administrative Rights](#)

[Roles: General Field Descriptions](#)

[Roles: Access Control Rights Field Descriptions](#)

[Roles: Security Rights Field Descriptions](#)

[Roles: Advanced Field Descriptions](#)

Roles: Access Control Rights

The Access Control Rights details tab contains configuration of rights to access administrative areas. These rights determine which items can be viewed and which ones can be modified (that is, perform CIC client functions such as pick up calls, listen in on calls, place calls on hold, change (valid) status, and so on). These rights can be set at the default user, role, user or workgroup level. Click the name of the details tab for field descriptions.

Note: Administrative, access control and security rights can be inherited from the default user, roles, and workgroups. See Rights Inheritance for more information.

This topic provides instruction for role access control rights.

To complete the role's access control rights information:

1. Click the [Access Control Rights](#) detail tab to display the details view.
2. Click **Browse for more rights**.



Access Control Rights Overview for Supervisor

This is an overview of the effective access control rights for Supervisor. Effective rights consist of rights that are set on Supervisor and rights that are inherited.

[Browse for more rights](#)



3. Click a rights category to expand the list of specific rights:



Overview



User Management



Queues

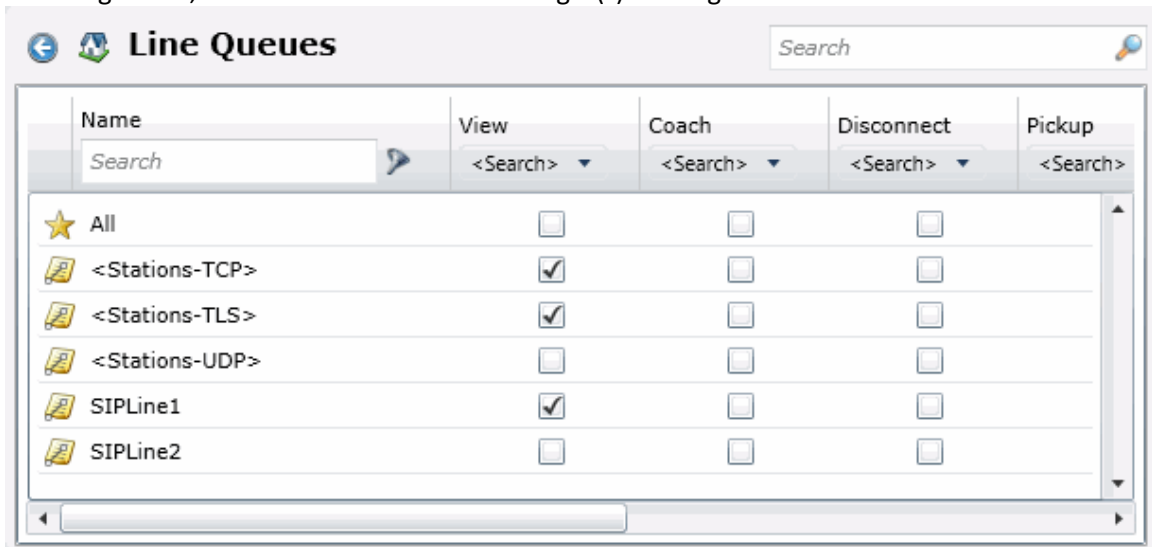


Hardware



Applications

4. In the rights list, select the check box for the right(s) to assign.

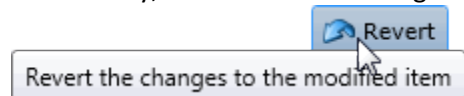


- To filter the rights list, click and select the filter type to apply to the list and type into the Name search text box.
 - Contains
 - Starts with
 - Matches whole word
- To display the rights assigned select **Yes** from the **Has right** drop-down box. Selecting **No** displays rights that are not assigned to the user.
- Use the button to return to the previous detail view, or click to go to the Home category list.

5. Save the new role or modified role.



If necessary, the new role or changes made to an existing role can be reverted.



Related Topics

- [Add a Role](#)
- [Roles: Access Control Rights Field Descriptions](#)
- [Roles: General](#)
- [Roles: Administrative Rights](#)
- [Roles: Security Rights](#)
- [Roles: Advanced](#)

Roles: Access Control Rights Field Descriptions

This topic contains the descriptions for each access control right in each category in the Access Control Rights details view under the View Roles master view.

The Home page of the Administrative rights includes the following categories:

- Overview (all access control rights)
- [User Management](#)
- [Queues](#)
- [Hardware](#)
- [Applications](#)
- [Interaction Attendant Profiles](#)
- [System](#)

The following tables show the available administrator access control groups and the associated descriptions, by category:

User Management Category		
Group	Name	Description
Account Codes	View	Determines which account codes can be viewed in the CIC clients. To assign account codes to incoming and outgoing calls the Account Code Verification security right must be assigned in addition to this access control right.
Client Buttons	View	Determines which custom buttons can be viewed on the Queue Control toolbar in the CIC clients.
Directory Status Columns	View	Determines which status columns can be added to a directory view. These status columns include: Activated, Forward Number, Logged In, Notes, On Phone, Status, Status Summary, Time in Status, and Until.
Queue Columns	View	Determines which various queue columns in user, station, orbit or workgroup queues can be viewed.
Skills	View	Determines which IPA skills can be viewed and filtered in Process Designer.
Users	Change Status	Determines which users' status can be changed.
	View History	Determines which users' status history can be viewed.
Workgroups	View	Determines which workgroup directories can be viewed.

	View Statistics	CIC clients: View workgroups in the Workgroup Statistics view. Interaction Supervisor: View and select workgroup statistics.
Queues Category		
Group	Name	Description
Line Queues	View	Determines which line queues can be viewed.
	Coach	Determines which line queue's interactions can be coached.
	Disconnect	Determines which line queue's interactions can be disconnected.
	Pickup	Determines which line queue's interactions can be picked up.
	Transfer	Determines which line queue's interactions can be transfer.
	Join	Determines which line queue's interactions can be joined.
	Listen	Determines which line queue's interactions can be listened.
	Record	Determines which line queue's interactions can be recorded.
Station Queues	View	Determines which station queues interactions can be viewed.
	Search	Determines which station queues can be transfer targets in the Transfer dialog box.
	Disconnect	Determines which station queue's interactions can be disconnected.
	Hold	Determines which station queue's interactions can be held.
	Mute	Determines which station queue's interactions can be muted.
	Pickup	Determines which station queue's interactions can be picked up.
	Transfer	Determines which station queue's interactions can be transferred.
	Coach	Determines which station queue's interactions can be coached.

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	Join	Determines which station queue's interactions can be joined.
	Listen	Determines which station queue's interactions can be listened.
	Record	Determines which station queue's interactions can be recorded.
User Queues	View	Determines which user queues can be viewed.
	Statistics	Determines which user queues' statistics can be viewed.
	Disconnect	Determines which user queue's interactions can be disconnected.
	Hold	Determines which user queue's interactions can be held.
	Mute	Determines which user queue's interactions can be muted.
	Pickup	Determines which user queue's interactions can be picked up.
	Transfer	Determines which user queue's interactions can be transferred.
	Coach	Determines which user queue's interactions can be coached.
	Join	Determines which user queue's interactions can be joined.
	Listen	Determines which user queue's interactions can be listened.
	Record	Determines which user queue's interactions can be recorded.
Workgroup Queues	View	Determines which workgroup queues can be viewed. Note: The View Workgroup Queue rights are used as a filter for which workgroups are exposed to a user, when the user is using the Telephone User Interface (TUI) to send or forward voice mail and email messages.
	Search	Determines which workgroup queues can be transfer targets in the Transfer dialog box.
	Activate Others	Determines which workgroup queue's members can activate themselves.

	Activate Self	Determines which workgroup queue's members can activate others.
	Disconnect	Determines which workgroup queue's interactions can be disconnected.
	Pickup	Determines which workgroup queue's interactions can be picked up.
	Transfer	Determines which workgroup queue's interactions can be transferred
	Coach	Determines which workgroup queue's interactions can be coached.
	Join	Determines which workgroup queue's interactions can be joined.
	Listen	Determines which workgroup queue's interactions can be listen.
	Record	Determines which workgroup queue's interactions can be recorded.

Hardware Category

Group	Name	Description
Stations	Login	Determines which stations can be logged in.
Station Groups	View	Determines which station groups can be viewed.
	Search	Determines which station groups can be transfer targets in the Transfer dialog box.

Application Category

Group	Name	Description
Interaction Feedback Surveys	View	Determines which Interaction Feedback surveys can be viewed.
	Modify	Determines which Interaction Feedback surveys can be modified.
Interaction Process Automation Processes Note: In addition to these rights, the following Interaction Process Automation rules apply: * If a user is the originator of a process, view rights	View	Determines what processes in Process Monitor and Interaction Desktop can be searched for and viewed.
	Manage	Determines which processed can be searched, canceled, and retried in Process Monitor.
	Launch	Determines which processes can be launched in Interaction Desktop. Note: A process must be published before it can be launched.

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for that process are implied. * If a user is the owner of a process, launch, view, and modify rights are implied.		
Interaction Optimizer	Manage	Determines if the Interaction Optimizer Administration Module in the Interaction Center Business Manager (ICBM) application is accessible.
Interaction Optimizer Scheduling Units	View	Determines which Optimizer scheduling units can be viewed.
Interaction Conference Rooms	View	Determines if a conference room is available for creating conferences. Conference rooms (defined telephone phone numbers/stations for use in Interaction Conference) can be restricted without this right. Without this right, users can still call into the room if they have a pin, but they can't make conferences that use it. By default, everyone who has access to Interaction Conference can use every room defined in CIC.
Interaction Dialer Campaigns	View	Determines which campaigns can be viewed.
	Modify	Determines which campaigns can be modified.
	View Automatic Time Zone Mapping	Determines which campaign time zone configuration can be viewed.
	Modify automatic Time Zone Mapping	Determines which campaign time zone configuration can be modified.
	View Agentless Calling Mode	Determines which campaign calling mode configuration can be viewed.
	Modify Agentless Calling Mode	Determines which campaign calling mode configuration can be modified.
	View Line Settings	Determines which campaign line setting configuration can be viewed.
	Modify Line Settings	Determines which campaign line setting configuration can be modified.
	View Max Lines Per Campaign	Determines if the maximum number of campaign lines can be viewed.
	Modify Max Lines Per Campaign	Determines if the maximum number of campaign lines can be modified.
	View Statuses	Determines which campaign statuses can be viewed.

	Modify Statuses	Determines which campaign statuses can be modified.
Interaction Dialer Rule Sets	View Custom Handler	Determines which rule actions custom handlers can be viewed.
	Modify Custom Handler	Determines which rule actions custom handlers can be modified.
	View Event Log	Determines which rule actions event logs can be viewed.
	Modify Event Log	Determines which rule actions even logs can be modified.
Interaction Recorder Questionnaires	View	Determines which Questionnaire directories are available from the drop-down list in the Interaction Recorder Questionnaire container. If available from the list, a recording can be scored with that Questionnaire.
	Modify	Determines which Questionnaires can be modified.
Interaction Attendant Profiles Category		
Group	Name	Description
Interaction Attendant Email Profiles	View	Determines which Interaction Attendant email profiles can be viewed. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Search	Determines which Interaction Attendant email profiles are available in the "Transfer to" dialog box. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Modify	Determines which Interaction Attendant email profiles can be modified. Users who can modify a profile can acquire a lock and edit/publish it.
Interaction Attendant Inbound Profiles	View	Determines which Interaction Attendant inbound profiles can be viewed. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Search	Determines which Interaction Attendant inbound profiles are available in the "Transfer to" dialog box. Users who can view a profile have a lock on the

IC Server Manager Administrator Printable Help

		profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Modify	Determines which Interaction Attendant inbound profiles can be modified. Users who can modify a profile can acquire a lock and edit/publish it.
Interaction Attendant Operator Profiles	View	Determines which Interaction Attendant operator profiles can be viewed. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Search	Determines which Interaction Attendant operator profiles are available in the "Transfer to" dialog box. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Modify	Determines which Interaction Attendant operator profiles can be modified. Users who can modify a profile can acquire a lock and edit/publish it.
Interaction Attendant Outbound Profiles	View	Determines which Interaction Attendant outbound profiles can be viewed. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Search	Determines which Interaction Attendant outbound profiles are available in the "Transfer to" dialog box. Users who can view a profile have a lock on the profile icon. A tooltip is displayed over the icon explaining why the profile is locked.
	Modify	Determines which Interaction Attendant outbound profiles can be modified. Users who can modify a profile can acquire a lock and edit/publish it.
System Category		
Group	Name	Description
General Directories	View	Determines which general directories can viewed.
IC Data Sources	View	Determines which data sources the user can configure and reference in database actions in Interaction Process Automation.
Interaction Reporter Reports	View	Determines which Interaction Reporter reports can be generated.
Layouts	View	Determines which layouts the user can view.
Misc Items	View	Allows a user to log in on behalf of another user.

Phone Number - Classifications	View	Determines which phone number classifications can be accessed, such as Blocked or Long Distance.
	Follow-me	Determines which phone number classifications can be used as follow-me numbers.
	Forward	Determines which phone number classifications can be used as forwarding numbers.
	TUI	Determines which phone number classifications can be used as forward numbers available through the menu when logged into voice mail. This access right prevents toll-fraud through the TUI.
Plug-ins	View	Determines which plug-ins can be added.
Positions	View	Determines which floor plan images (positions) the user can use in Interaction Supervisor iPad Edition.
Response Management	View	Allows access to chat features.
Status Messages	View	Determines which statuses can be selected from the My Status drop-down list or from the Set Status list when changing another user's status.
e-FAQs	View	Determines if e-FAQ configuration can be viewed.

Related Topics

[Roles: General Field Descriptions](#)

[Roles: Access Control Rights](#)

[Roles: Administrative Rights Field Descriptions](#)

[Roles: Security Rights Field Descriptions](#)

[Roles: Advanced Field Descriptions](#)

Roles: Security Rights

The Security Rights details tab contains configuration of rights to manage CIC client application functionality, such as buttons for recording, listening, and coaching. These rights can be set at the default user, role, user or workgroup level. Click the name of the details tab for field descriptions.

Note: Administrative, access control and security rights can be inherited from the default user, roles, and workgroups. See Rights Inheritance for more information.

This topic provides instruction for role security rights.

To complete the user's security rights information:

1. Click the [Security Rights](#) detail tab to display the details view.

2. Click **Browse for more rights**.



Security Rights Overview for Andrew Johnson

This is an overview of the effective security rights for Andrew Johnson. Effective rights consist of rights that are set on Andrew Johnson and rights that are inherited.

[Browse for more rights](#)



3. Click a rights category to expand the list of specific rights:



Overview



Applications

4. In the rights list, select the check box for the right to assign.

Name	Has right
<input type="text" value="Search"/>	<Search>
Account code verification	<input type="checkbox"/>
Can create speed dials	<input type="checkbox"/>
Conference calls	<input type="checkbox"/>
Customize client	<input type="checkbox"/>
Monitor columns	Inherited
Multiple calls	Inherited
Orbit queue	<input type="checkbox"/>

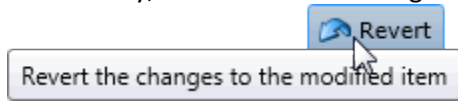
- To filter the rights list, click and select the filter type to apply to the list and type into the **Name** search text box.
 - Contains
 - Starts with
 - Matches whole word
- To display the rights assigned select **Yes** from the **Has right** drop-down box. Selecting **No** displays rights that are not assigned to the role.
- Use the button to return to the previous detail view, or click to go to the Home category list.

5. Save the new user or modified role.



Save the modified item (Ctrl+S)

If necessary, the new role or changes made to an existing role can be reverted.



Related Topics

[Add a Role](#)

[Roles: Security Rights Field Descriptions](#)

[Roles: General](#)

[Roles: Administrative Rights](#)

[Roles: Access Control Rights](#)

[Roles: Advanced](#)

Roles: Security Rights Field Descriptions

This topic contains the descriptions for each security right in each category in the Security Rights details view under the View Roles master view.

The Home page of the Administrative rights includes the following categories:

- Overview (all security rights)
- [User Management](#)
- [Applications](#)

The following tables show the available security rights groups and the associated descriptions, by category:

User Management Category		
Group	Name	Description
Interaction Client	Account Code Verification	Allows users to assign account codes to incoming and outgoing interactions. See also the View Account Codes access control right.
	Can Create Speed Dials	Allows users to create speed dial views.
	Client Templates	Allows users to create and edit configuration templates for CIC clients.
	Conference Calls	Allows users to create conference calls. See also the Conference Rooms access control right.
	Customize Client	Allows users to customize configuration settings in CIC clients. It also allows users to add view, however, the ability to display certain views may require additional access control rights.
	Monitor Columns	Allows users to add the Lstns column and Recs column to a queue view. The Lstns column shows a

		<p>speaker icon when someone is listening to the conversation. The Recs column shows a red dot icon to indicate that the conversation is being recorded.</p>
	Multiple Calls	<p>Determines whether or not users are alerted when a new call arrives in the queue when already on a call. This only occurs on calls into lines that are marked "Allow Deferred Answer."</p> <p>If users do not have this right, or are already on a call and do not have call coverage set to forward calls when busy, then they are not alerted to the new call and it rolls to voice mail.</p> <p>This setting does not actually prevent multiple calls from being on a queue at the same time. It merely controls whether users are alerted or not. This setting applies only to My Interactions, not to calls to a logged-in station or default workstation.</p>
	Orbit Queue	<p>Allows users to park a call on orbit.</p>
	Persistent Connections	<p>Allows users the option of keeping remote telephone connected until you log off.</p> <p>Allows users to select Allow Persistent Connection when using a Dynamic Remote Client Connection.</p>
	Personal Rules	<p>Allows users to set up Personal Rules or create a Quick Call rule. These rules automatically perform specific actions when triggered by certain interactions</p>
	Problem Reporter	<p>Allows users to use the Problem Reporter option from the File menu in the CIC clients. This option allows users to send an email message containing problem information to a specified email recipient.</p>
	Receive voice mail	<p>If users have this right, callers are sent to voice mail when in a DND status (Gone Home, Out of the Office, or some other "not available" status) or when not answering phone.</p> <p>If users don't have this right, callers are returned to the Interaction Attendant main menu.</p>
	Response Management	<p>Allows users to use Response Management to incorporate a stored response such as a standard greeting or their company's support website address in e-mail messages, chats, callback requests, or text message.</p>
	Status Notes	<p>Allows users to create a Status Note when they set Status details for themselves or other users. Status</p>

		Notes provide additional details about status, for example, the date an agent expects to return after vacation.
	User-defined Telephone Number on Remote Login	Allows users to enter a new Remote Number when logging in. See Dynamic Remote Client Connections.
	Workgroup Statistics	Allows users to enter a new Remote Number when logging in.
	Workgroups Profiles Tab	Allows users to display the Workgroup and Profiles view. This view lists workgroups and Attendant Profiles by name.
Handlers	Debug	Allows users to debug handlers published to the IC server. This applies only to users who have the Interaction Designer program and who are authorized to update production handlers or create new handlers on the IC telephony server. If this check box is not selected, users who attempt to debug handlers from Interaction Designer will see an appropriate error message.
	Manage	Allows users to add or remove handlers published to the IC server. A handler's status can be managed by someone running the Interaction Designer program on a workstation and using the Manage Handlers command on the Tools menu. If this option is not selected, users who attempt to manage handlers from Interaction Designer will see an appropriate error message.
	Publish	Allows users to publish new or updated handlers on the IC server. This applies only to users who have the Interaction Designer program and who are authorized to update production handlers or create new handlers on the IC telephony server. If this check box is not selected, users who attempt to publish handlers from Interaction Designer will see an appropriate error message.
Interaction Commands - (Restricts which commands are visible in the CIC clients) Note: These rights control the	Assistance	Displays the Assistance button.
	Coach	Displays the Coach button.
	Disconnect	Displays the Disconnect button.
	Hold	Displays the Hold button.
	Join	Displays the Join button.
	Listen	Displays the Listen button.

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buttons in Interaction Client.	Mute	Displays the Mute button.
	Park	Displays the Park button.
	Pause	Displays the Pause button.
	Pickup	Displays the Pickup button.
	Private	Displays the Private button.
	Record	Displays the Record button.
	Secure Input	Displays the Secure Input button.
	Secure Recording Pause	Displays the Secure Record button.
	Transfer	Displays the Transfer button.
	Voicemail	Displays the Voicemail button.
My Interactions	Coach Interactions	Allows users to coach interactions by adding themselves to other agents' interactions.
	Disconnect Interactions	Allows users to disconnect interactions using a CIC client instead of hanging up the telephone.
	Join Interactions	Allows users to join interactions, thus creating a conference call.
	Listen in on Interactions	Allows users to listen to calls. Both sides of a call can be heard.
	Mute Interactions	Allows users to disable the microphone on the telephone so that the other party or parties cannot hear what is being said during a call. It also enables users to reactivate the microphone.
	Park Interactions	Allows users to park calls on orbit. Note: Can only park calls appearing in My Interactions.
	Pause Interactions	Allows users to use the Pause button to control a recording session. The button can be clicked to pause the recording session. It can be clicked again to resume the recording session.
	Pickup Interactions	Allows users to pick up interactions.
	Private Interactions	Allows users to prevent other CIC client users from recording or listening to their conversation.
	Put Interactions on Hold	Allows users to place selected interactions on hold.
Record Interactions	Allows users to record interactions. The recordings are stored in files.	

	Request Assistance from Supervisors	Allows users to request assistance from supervisors.
	Secure Recording Pause Interactions	Allows users to securely pause a recording to avoid recording sensitive information, such as Social Security numbers or credit card numbers, when recording interactions.
	Transfer Interactions	Allows users to transfer interactions.
	Transfer Interactions to Voicemail	Allows users to transfer calls to voice mail.
Remote Access	Email Access via TUI	Allow users to participate in e-mail interactions through the Telephone User Interface (TUI).
	Fax Access via TUI	Allows users to participate in fax interactions through the Telephone User Interface (TUI).
	Mobile Office User	Allows users access to the Mobile Office feature.
	Outlook TUI User (Requires Mobile Office User)	Allows users access to Microsoft Outlook through the Telephone User Interface (TUI).
	Voicemail Access via TUI	Allows users to participate in voice mail interactions through the Telephone User Interface (TUI).
User	Alert Programming	This right controls whether or not users can add, edit and remove alerts. When this right is assigned, context menus over statistic-based values in Supervisor provide the ability to add, edit and remove alerts. Without this right, users can only view alerts.
	Directory Administrator	Allows users to edit public directories that were created by other users.
	Follow Me	Allows users to call-forward multiple numbers, long distance numbers, and international numbers.
	Intercom Chat	Allows users to have intercom chats between other users on the same IC server.
	IP Phone Provisioning Administrator	Allows users to provision IP phones in the Managed IP Phones container.
	Remote Control	Allows users to remotely run applications and utilities that are Notifier clients, for example, IC System Manager and Switchover Control Panel.
	Require Forced Authorization Code	Requires users logged into station phones to enter a code that authorizes toll number calls.

IC Server Manager Administrator Printable Help

	TIFF Faxes	Allows users to use TIFF (Tag Image File Format) for faxes.
	Trace Configuration	Allows users to configure tracing using IC System Manager or IC Trace utility.
	Video	Reserved for future use.
	View Interaction Details	Allows users to use Interaction Details view in the Interaction Tracker category. This view allows Interaction Supervisor users to search for interactions and examine the details.
Application Category		
Group	Name	Description
Interaction Reporter	Interaction Reporter administrator	Allows users to configure all features and functions in Interaction Reporter.
Interaction Conference	Create and Modify All Conferences	Allows users to create conferences and to modify <i>all</i> conferences regardless of creator.
	Create and Modify Conferences	Allows users to create conferences, but to modify only those conferences they created.
Interaction Tracker	Add Individuals	Allows users to add individuals in Interaction Tracker Client.
	Add Organizations	Allows users to add organizations in Interaction Tracker Client.
	Delete Individuals	Allows users to delete individuals in Interaction Tracker Client.
	Delete Organization	Allows users to delete organizations in Interaction Tracker Client.
	Execute long-running Queries	Allows users to run more advanced queries against the Interaction Tracker database.
	Have Private Contacts	Allows users to create contacts that cannot be viewed by others.
	Interaction Tracker Administrator	Gives users the rights to access all pages in Interaction Tracker Client.
	Modify Individuals	Allows users to change or update individuals in Interaction Tracker Client.
	Modify Interactions	Allows users to change or update interactions in Interaction Tracker Client.

	Modify Organizations	Allows users to change or update organizations in Interaction Tracker Client.
	Related Interactions Page	Allows users to view the page that shows related interactions in Interaction Tracker Client.
	View Other People's Private Interactions	Allows users to view private interactions of other users in Interaction Tracker Client.
Interaction Dialer	Login Campaign	Allows users to log in to a campaign.
	Modify General	Allows users to modify the general campaign settings page.
	View General	Allows users to view the general campaign settings page.
	Modify Preview Call Behavior	Allows users to modify the preview call behavior on the miscellaneous campaign configuration page.
	View Preview Call Behavior	Allows users to view the preview call behavior on the miscellaneous campaign configuration page.
	Modify Outbound Servers	Allows users to modify the outbound server settings on the campaign configuration page.
	View Outbound Servers	Allows users to view the outbound server settings on the campaign configuration page.
	Modify Change Auditing	Allows users to modify the auditing behavior on the miscellaneous campaign configuration page.
	View Change Auditing	Allows users to view the auditing behavior on the miscellaneous campaign configuration page.
	Modify Phone Number Types	Allows users to modify the phone number types on the phone number types page in campaign configuration.
	View Phone Number Types	Allows users to view the phone number types on the phone number types page in campaign configuration.
	Modify HTTP Server	Allows users to modify the campaign server settings.
	View HTTP Server	Allows users to view the campaign server settings.
	View/Modify Campaign Agentless Calling Type	Determines whether users can select Agentless dialing mode when setting the Calling mode for a Campaign.

IC Server Manager Administrator Printable Help

View/Modify Campaign Automatic Zone Mapping	Grants right to check "Automatically map time zones and all child options in a Campaign object. Without this right, options are disabled.
View/Modify Line Settings	Set options in the Dialer Line Information group box for a Campaign. These options configure Dialer to adhere strictly to CIC's Dial Plan or to use one specific line group for campaign calls.
View/Modify Campaign Maximum Lines	Determines whether the <i>Maximum Lines per Campaign</i> setting on the Basic Configuration tab of a Campaign is enabled or not.
View/Modify Custom Handler Actions	Grants right to run the Dialer_RuleActionEvent handler by setting up a Rule Action or Policy Behavior. A user who does not have this right cannot modify settings that configure a Run Handler rule action.
View/Modify Database Connections	Grants right to view and modify Database Connections in Dialer Manager. When this right is not granted, Database Connection options are disabled.
View/Modify DNC Sources	Grants right to view and modify the DNC Sources view in Dialer Manger. A DNC Source provides a list of telephone numbers that should not be dialed. When this right is not granted, DNC options are disabled.
View/Modify Time Zone Map Data	Grants right to view and modify the Timezone Map Data view in Dialer Manger. A time zone map is a file that associates the initial digits of a phone number (area code and exchange in North America, for example) with a time zone. When this right is not granted, options on the view are disabled.
View/Modify Event Log	Grants right to configure Rule Set Actions or Policy Set Behaviors that write an event log entry.
View/Modify Contact List Data Query	Determines whether or not the Data Query tab of a Contact List object is visible or not. The Data Query tab queries the contact list to display a list of results in a data grid. Query results can be saved as filters. Users may also apply actions to records displayed in the grid, and commit changes back to the database.
View/Modify Campaign Status	Enables the Campaign Execution Panel for a campaign entry. Users who have this right can control the running state of a campaign, whether it

		runs in accordance with a schedule, or in a manually operated state. Users can also recycle the contact list, recycle the campaign, and test to ensure that campaign settings are valid. When not granted, these controls are disabled.
	Lock policy sets	<p>Enables the user to lock a Dialer policy object, which prevents it from being modified, removed, or unlocked by anyone who does not have Master Administrator rights.</p> <p>Once a policy is locked, users who are not Master Administrators can view the policy, but they cannot remove or edit it until a Master Administrator removes the lock. Locked policies can be assigned to a campaign, but they cannot be removed from a campaign without Master Administrator rights.</p>
Interaction Optimizer	Allow Agent Preferences	Allows users to set schedule preferences in Interaction Desktop.
	Allow agent to do schedule bidding	Allows user to set or his her schedule preferences in Interaction Desktop.
	Allow agent to see their rank	Allows user to view the ranking of the user's potential schedules in order from most desired to least desired. For example, "Your rank is 22."
	Allow agent to see their relative rank	Allows user to view the relative ranking of the user's potential schedules as compared to other agents' rankings. For example, "Your rank is 22 out of 45 for this bid."
	Delete scheduling units	Allows user to delete scheduling units.
	Create scheduling units	Allows user to add scheduling units.
	Can view Optimizer Day Classifications	Allows user to view day classifications in Optimizer.
	Can modify Optimizer Day Classifications	Allows user to edit day classifications in Optimizer.
	Can create Optimizer Day Classifications	Allows user to add day classifications in Optimizer.
	Can delete Optimizer Day Classifications	Allows user to delete day classifications in Optimizer.
	Can View Activity Codes	Allows user to view activity codes.
Can Modify Activity Codes	Allows user to edit activity codes.	

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	Can Delete Activity Codes	Allows user to delete activity codes.
	Can View Activity Type Mapping	Allows user to view activity type mappings.
	Can submit time off	Allows user to request time off.
Interaction Recorder Policy	Create and Delete Questionnaire Directories	Allows users to create or delete questionnaire directories, and also create or delete rankings.
	Policy Editor	Allows users to access Policy Editor in Interaction Recorder Client.
	Override Finished Scorecards	Allows users to modify finished scorecards for questionnaires in questionnaire directories that can be viewed. A scorecard is considered finished when "Finish" is clicked on the scoring dialog box. Normally, a finished scorecard cannot be change. Note: Overriding a finished scorecard can affect reports.
Interaction Tracker	Add individuals	Allows user to add individuals in Interaction Tracker.
	Add organizations	Allows user to add organization in Interaction Tracker.
	Delete individuals	Allows user to delete individuals in Interaction Tracker.
	Have private contacts	Allows user to have private contacts in Interaction Tracker.
	Interaction Tracker administrator	Allows user to access and configure all of the features and functions in Interaction Tracker.
	Modify individuals	Allows user to edit individuals in Interaction Tracker.
	Modify interactions	Allows user to edit interactions in Interaction Tracker.
	Modify organizations	Allows user to edit organizations in Interaction Tracker.
	Related Interactions page	Allows user to view the Related Interactions page in Interaction Tracker.
	View other people's private Interactions	Allows user to view interactions that other users have designated as "private." The user sees these interaction in the Related Items view and in the Find Interaction dialog box.

		Users designate interactions as "private" to prevent other users from recording or listening to them.
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Related Topics

[Roles: Security Rights](#)

[Roles: General Field Descriptions](#)

[Roles: Administrative Rights Field Descriptions](#)

[Roles: Access Control Rights Field Descriptions](#)

[Roles: Advanced Field Descriptions](#)

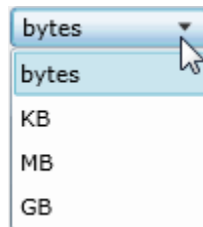
Roles: Advanced

The Advanced tab information for Interaction Message Store quotas, custom attributes, and history. Click the name of the details tab for field descriptions.

To complete the role's advanced information:

1. Click the [Advanced](#) detail tab to display the details view.
2. Click Interaction Message Store quotas section expander to display (or hide) the message store quotas section's contents, and complete the following information:

- Click the radio button to select the **Storage Size**. If **Limit to:** is selected, use the up and down arrows to set the size or type in the text box, and select the units from the drop-down box.



- Click the radio button to select the **Number of Messages**. If **Limit to:** is selected, use the up and down arrows or type in the text box to set the number.

3. Click Custom Attributes section expander to display (or hide) the custom attributes section's contents, and complete the following information:

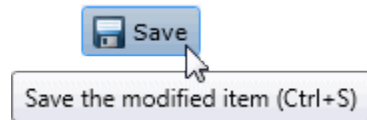
- To create a custom attribute, click **+** and type an attribute name. You must also enter a value for the new attribute.

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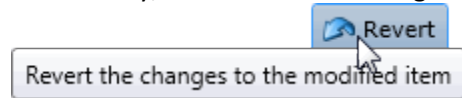
4. Click History section expander to display (or hide) the history section's contents, and complete the following information:

- View the **Created** and **Modified** dates for this workgroup.
- Type or view information in the **Notes** field for the workgroup.

5. Save the new role or modified role.



If necessary, the new role or changes made to an existing role can be reverted.



Related Topics

[Add a Role](#)

[Roles: Advanced Field Descriptions](#)

[Roles: General](#)

[Roles: Administrative Rights](#)

[Roles: Access Control Rights](#)

[Roles: Security Rights](#)

Roles: Advanced Field Descriptions

This topic contains the descriptions for each field in the Advanced details view under the View Roles page.

Interaction Message Store Quotas

Interaction Message Store stores voice mail and faxes as files on the IC Server (small implementations), or a network file server (large implementations). Users assigned this role are associated with mailboxes in a file directory structure, and voice mails and faxes are routed to these mailboxes. CIC users can access voice mail messages from the CIC clients or the telephone user interface (TUI). From the CIC clients, a user can view a fax message or forward it to another fax number.

Storage Size

Enter the maximum amount of storage space (in bytes, KB, MG, or GB), to allocate voice mail messages. By default, the setting uses the inherited value. Select **Unlimited** to use unlimited space for voice mail messages.

Number of Messages

Enter the maximum number of messages to allocate voice mail messages. By default, the setting uses the inherited value. Select **Unlimited** to allow any number of voice mail messages.

Related Topics

[Roles: Advanced](#)

[Roles: General Field Descriptions](#)

[Roles: Administrative Rights Field Descriptions](#)

[Roles: Access Control Rights Field Descriptions](#)

[Roles: Security Rights Field Descriptions](#)

Skills

Skills represent the particular characteristic, skill, product, or knowledge that a user or workgroup possesses. Skills are used by ACD (Automatic Communication Distribution) handlers to route interactions to the agents who are best equipped to handle them.

After you create skills in the **Skills** container, you can assign them to agents in the **Skills** container or the **Users** container. You can also assign skills to ACD workgroups in the **Workgroups** container. All agents in a workgroup inherit the skills that you assign to the workgroup.

Note: You cannot assign skills to a non-ACD workgroup or a custom workgroup.

Prerequisites: For each skill, you can select the workgroups, users, and access control groups who have it. While you can add these items at any time, it can be more efficient to add them before you configure skills.

* Define workgroups in the **Workgroups** container. On the Configuration tab, in the **Workgroup has Queue** list, be sure to select **ACD**.

* Define users in the **Users** container.

* Define access control groups in the **Access Control Groups** container.

How CIC routes interactions based on skills

CIC uses sophisticated mathematical algorithms to determine how to route interactions to agents. For more information on the ACD routing process, see the *CIC ACD Processing Technical Reference* in the PureConnect Documentation Library.

When you define skills, you set several values that influence the automated routing behavior:

- [Proficiency level](#)
- [Desire to use](#)

Proficiency level

For each skill, you assign a proficiency level. The proficiency scale is from 1-100, with 100 being the highest value. The proficiency number represents of the ability of the user or workgroup with regards to the skill. Interactions can require minimum proficiency levels for one or more skills.

For example, suppose you have four agents who speak Spanish. Juan is a native speaker, so you assign him a proficiency level of 100. Rebecca studied Spanish in college and can speak and understand conversational Spanish well enough to address most straightforward questions. You assign Rebecca a proficiency level of 60. Barb knows a few basic phrases, so you assign her a proficiency level of 10. Mark does not know Spanish. Therefore, you do not assign the skill to him at all. When an interaction comes in with a requirement of Spanish at 51, CIC can direct it to either Barb or Roger.

Depending on the complexity of your combination of skills and agents, you may prefer to identify your criteria for assigning proficiency levels offline before you assign them in CIC.

Desire to use

For each skill, you also set the **Desire to use** level. The desire to use scale is from 1-100, with 100 being the highest value. The desire to use number represents the level of interest the user or workgroup has in applying the skill while they are handling interactions. You can also set this based on your organization's desire for an agent or workgroup to use that skill. The higher you set this number, the greater the likelihood that an agent or workgroup will receive an interaction that requires that skill.

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For example, suppose that Rebecca wants to use her Spanish whenever possible. However, since Juan is a native speaker, you would prefer that he answer interactions requiring Spanish ability whenever possible. Therefore, you set Juan's desire to use level to 100 and Rebecca's desire to use level to 80.

Depending on the complexity of your combination of skills and agents, you may prefer to identify your criteria for assigning desire to use levels offline before you assign them in CIC.

Related Topics

[Add a skill](#)

[Configure general information](#)

[Configure advanced information](#)

Add a skill

Note: If you enabled the Enhanced Interaction Administrator Change log, then the addition of a skill is tracked in that log. For more information, see *About the Enhanced Interaction Administrator Change Log*.

To add a skill

1. In the **People** container, click the **Skills** subcontainer.
2. In the master view area, right-click and select **New**, or click the **New** button in the master view toolbar.
3. In the **Name** box, use a word or phrase to identify the skill. You can use blank spaces (for example, Spanish speaker, Database expertise, and so on).
6. Configure [general information](#).
7. Configure [advanced information](#).

Related Topics

[Skills](#)

[Configure general information](#)

[Configure advanced information](#)

Configure general information

Use the **Configuration** tab to configure the access control group, workgroups, and users for a skill.


Notes:

- You can assign skills to workgroups and users in the **Skills** container as described in the following procedure. You can also assign skills to users in the **Users** container and to workgroups in the **Workgroups** container.
- If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see *About the Enhanced Interaction Administrator Change Log*.


To configure general information

1. In the details area of the Skills window, click the **Configuration** tab.
2. If the **Access Control Group** box appears, click the icon to select the ACG for the skill.
An access control group (ACG) is a group of administrative rights. When an ACG is added to the skill, the user that is assigned this skill takes on those ACG's rights. The skill can be assigned to only one ACG.

Note: Access Control Groups appear if they have been configured in the Access Control Groups container. If Access Control Groups have not been configured, this field is not displayed.

3. To select the workgroups that have the skill, in the **Workgroups** section, click the  button.
4. Select one or more workgroups in the **Available** items list, and click **Add**. Alternatively, click **Add all** to add the skill to all workgroups. To find a specific workgroup, type a simple search in the filter field above the list.

Note: You can select only ACD workgroups. If the workgroup you need does not appear here, go to the **Workgroups** container and edit the workgroup's record. On the **Configuration** tab, select the **Workgroup has Queue** checkbox. Then in the corresponding list, select **ACD**.

5. For each workgroup that has the skill, set the proficiency level. To do this, click under the **Proficiency** heading so that the field is active. Then either type a number or use the controls to select a number. The proficiency number represents the minimum proficiency of skill level workgroup members must have to receive an ACD interaction that requires the skill. The proficiency level is a relative number that you assign based on a scale of 1-100, where 100 is the highest level. For more information, see [Proficiency level](#).
6. For each workgroup that has the skill, set the desire to use level. To do this, click under the **Desire to use** heading so that the field is active. Then either type a number or use the controls to select a number. The desire to use number represents the minimum level of interest users must have in order to receive an ACD interaction that requires this skill. The desire to use level is a relative number that you assign based on a scale of 1-100, where 100 is the highest level. For more information, see [Desire to use](#).
7. To select the users who have the skill, in the **Users** section, click the  button.
8. Select one or more users in the **Available** items list, and click **Add**. Alternatively, click **Add all** to add the skill to all users. To find a specific user, type a simple search in the filter field above the list.
9. For each workgroup that has the skill, set the proficiency level. To do this, click under the **Proficiency** heading so that the field is active. Then either type a number or use the controls to select a number. The proficiency number represents the minimum proficiency of skill level workgroup members must have to receive an ACD interaction that requires the skill. The proficiency level is a relative number that you assign based on a scale of 1-100, where 100 is the highest level. For more information, see [Proficiency level](#).
10. For each workgroup that has the skill, set the desire to use level. To do this, click under the **Desire to use** heading so that the field is active. Then either type a number or use the controls to select a number. The desire to use number represents the minimum level of interest users must have in order to receive an ACD interaction that requires this skill. The desire to use level is a relative number that you assign based on a scale of 1-100, where 100 is the highest level. For more information, see [Desire to use](#).
11. Click **Save**.

Related Topics

[Overview of skills](#)

[Configure advanced information](#)


Configure advanced information

Use the **Advanced** tab information to configure for custom attributes and history.

Note: If you enabled the Enhanced Interaction Administrator Change log, then all of your changes on this tab are tracked in that log. For more information, see *About the Enhanced Interaction Administrator Change Log*.

You can define custom attributes for skills to further assist the ACD routing process in selecting the most appropriate agents. For more information on how to use custom attributes with skills, see the *CIC ACD Technical Processing Technical Reference* in the PureConnect Documentation Library.

To configure advanced information

1. In the Skills window details area, click the **Advanced** tab.
2. To create a custom attribute, under the **Custom Attributes** section, click the  button.
3. In the **Name** box, type the attribute name.
4. In the **Value** box, type the attribute value.
5. To add a history note, under the **History** section, in the **Notes** box, type the information that you wish to capture.
6. Click **Save**.

Related Topics

[Overview of skills](#)

[Configure general information](#)

Schedules

Schedules are dates and times that are set to activate *telephone-based menus*. Telephone-based menus (or simply menus) are the set of choices callers select by pressing buttons on a telephone keypad. In CIC, menus that are configured to run on certain days and at certain times are known as *scheduled menus*.

You might schedule a menu to run on a holiday, every Tuesday, after hours, or during lunch. However before you schedule a menu, you must have created the menu using the **Scheduled Menu** feature of Interaction Attendant. For more information, see the *Help for Interaction Attendant*.

The **View Schedules** page displays schedules in a list in the master view, and displays details of the currently selected schedule in the details view. You can take actions on the schedules in the list view, such as edit, delete or copy, and you can add a new schedule. You can change the way the list is displayed, such as change visible columns, sort by column, and filter.

To view Schedules:

1. Click the **View Schedules** action under the **User Management** category.
...or Click **View Schedules** in the breadcrumbs if available.
2. Click the schedule you want to view in the master view to display the details of the selected schedule in the details view.

Related Topics

[Add a Schedule](#)

[Schedules: Configuration](#)

[Schedules: Configuration Field Descriptions](#)

[Schedules: Advanced](#)

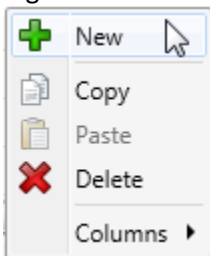
[Schedules: Advanced Field Descriptions](#)

Add a Schedule

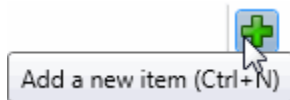
You can add a new schedule in Interaction Administrator Web Edition. The schedule settings are configured in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

To add a schedule:

1. Right-click in the master view area and select **New**:

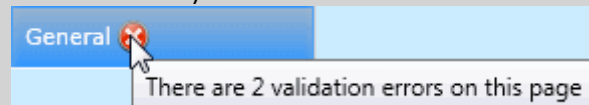


...Or click the **New** button in the master view toolbar:



2. Complete the schedule configuration in the two details tabs in the detail view. The links below open the topics containing procedures for completing each details tabs configuration:
 - [Configuration](#)
 - [Advanced](#)

Note: To save a new schedule, all required information must be entered. Details tabs containing incomplete or erroneous information, are shown with an error indicator (error details are displayed on mouse-over):



Related Topics

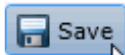
[Schedules: Configuration](#)

Schedules: Configuration

The Configuration details tab contains basic information, pattern, and start and stop times configuration for the schedule. Click the name of the details tab for field descriptions.

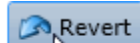
To complete the schedule's configuration information:

1. Click the **Configuration** details tab to display the details view.
2. Type the **Name** of the new schedule.
3. Type the **Description** of the schedule.
4. Click the **Schedule is active** check box to enable it.
5. Select the **Pattern** from the drop-down box.
6. Click on the calendar or type the date in the box, and click the clock or type the time in the box for both the **Start** and **End** dates and times.
7. Save the new schedule or modified schedule.



Save the modified item (Ctrl+S)

If necessary, the new schedule or changes made to an existing schedule can be reverted.



Revert the changes to the modified item

Related Topics

[Add a Schedule](#)

[Schedules: Advanced](#)

[Schedules: Configuration Field Descriptions](#)

[Schedules: Advanced Field Descriptions](#)

Schedules: Configuration Field Descriptions

This topic contains the descriptions for each field in the **Configuration** details view under the **View Schedules** page.

Name

Schedule names can be single words or phrases, including blank spaces (for example, Thanksgiving Menu, July Schedule, and so on).

Description

Type information that identifies the menu or type of scheduled event.

Schedule is Active

Select this check box to activate the schedule. When the schedule is active, it is available as a candidate for evaluation by the system. Clear the check box to deactivate the schedule.

Pattern

- **One Time**
Sets a menu to run for the specified time period, which plays the menu as often as needed.

Note: The One Time schedule should not be confused with the Unplanned schedule type in available in Interaction Attendant. An unplanned schedule allows you to specify an indefinite end time, staying active until it is turned off. See *Unplanned Schedules* in the Interaction Attendant online help for more information.

- **Daily**
Sets a menu to run every day at a specific time for a specified length of time
- **Weekly**
Sets a menu to run every week on certain days or every week in a sequence of days
- **Monthly**
Sets a menu to run on relative and specific days of the month
- **Yearly**
Sets a menu to run on specific and relative days during the year

The type of schedule determines the order in which CIC selects the schedule to play. The order of priority is as follows:

- **Unplanned:** Highest priority (See the note above under **One Time**.)
- **One Time**
- **Yearly**
- **Monthly**
- **Weekly**
- **Daily:** Lowest priority

If there is more than one schedule that matches in priority, then the start and end times are compared. The schedule containing the closest comparable times is the higher priority.

Related Topics

[Add a Schedule](#)

[Schedules: Configuration](#)

[Schedules: Advanced](#)



[Schedules: Advanced Field Descriptions](#)

Schedules: Advanced

The Advanced tab information for keywords custom attributes, and history. Click the name of the details tab for field descriptions.

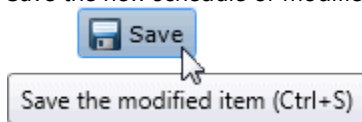
To complete the schedule's advanced information:

1. Click the [Advanced](#) detail tab to display the details view.

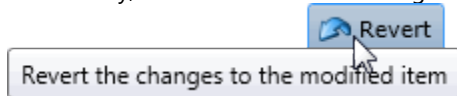
2. To add a keyword that categorizes the schedule, type in the box and click .
3. Click Custom Attributes section expander to display (or hide) the custom attributes section's contents, and complete the following information:
 - To create a custom attribute, click  and type an attribute name. You must also enter a value for the new attribute.

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4. Click History section expander to display (or hide) the history section's contents, and complete the following information:
 - View the Created and Modified dates for this schedule.
 - Type or view information in the Notes field for the schedule.
5. Save the new schedule or modified schedule.



If necessary, the new schedule or changes made to an existing schedule can be reverted.



Related Topics

[Add a Schedule](#)

[Schedules: Configuration](#)

[Schedules: Configuration Field Descriptions](#)

[Schedules: Advanced Field Descriptions](#)

Schedules: Advanced Field Descriptions

This topic contains the descriptions for each field in the **Advanced** details view under the **View Schedules** page.

Keywords

Type a unique name that categorizes the schedule. For example, if the schedule is one of many schedules for the **Support** department, you might want to specify "support" as the keyword. Then, all schedules with the keyword "support" are associated. The Get Schedules tool uses these keywords for retrieving a list of schedule-specific menus. For more information on the Get Schedules tool, see the Interaction Designer help.

Custom Attributes

Use customized attributes to reference other variables and settings through the IceLib interface. When adding a new attribute, use a unique name, otherwise an existing attribute with the same name will be overwritten. Click **Edit** to change the value of an existing custom attribute, or **Delete** to delete an existing custom attribute.

History

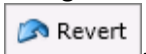
History provides a way to manually document configuration changes and when they occurred. Changes made in Interaction Administrator are also automatically logged in the Interaction Administrator Change Notification Log (Log ID 7). Later, authorized users can run reports against this log to summarize all configuration changes.

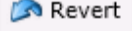
Created

This date is automatically set when the user creates the initial configuration for this schedule. If the schedule was initially created during setup, the date could be blank.

Modified

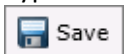
This date is automatically updated each time the user clicks the OK button, presumably after making changes to the schedule configuration. To avoid updating this date, exit the property sheet by clicking



Note: If you click , none of the changes made to this schedule since the changes were last saved are preserved.

Notes

Type notes about configuration settings and changes. If you change the configuration and click



, the **Last Modified** date is updated.

You must manually enter the date beside each entry in the **Notes** field to identify the date of each note.

Related Topics

[Add a Schedule](#)

[Schedules: Configuration](#)

[Schedules: Advanced](#)

[Schedules: Configuration Field Descriptions](#)

Access Control Groups

Access Control Groups (ACGs) provide a flexible way of defining [administrative access rights](#). For example, an ACG can allow an administrator access to manage and modify users and workgroups within a certain part of the organization, without having access to other parts of the organization.

An ACG is similar to Active Directory structure, where the structure is a hierarchical arrangement of information about objects. The ACG allows access rights to be assigned against the hierarchy to define which objects or items (see item list below) a user can access. You can define multiple ACGs containing subsets of objects from the "root" ACG. A user can have access to one ACG or multiple ACGs.

CIC includes a default ACG "Root" that is the parent of the hierarchy.



IC Server Manager Administrator Printable Help

You can create ACGs from the Root creating another level in the hierarchy, and create a subset of items of the root. You can then create another level of ACGs from those, and so on. The maximum levels in a hierarchy is five (5). For example, a hierarchy may look like:



An ACG can have only a single parent, and an item can only be a member of a one ACG.

ACGs can contain the following items:

- Account Codes
- [Analyzer Keyword Sets](#)
- Client Configuration Templates
- [IP Phones](#)
- IP Phone Proxy Groups
- IP Phone Ring Sets
- IP Phone Templates
- IP Tables
- Locations
- Password Policies
- [Roles](#)
- [Schedules](#)
- Skills
- Stations
- Station Groups
- Station Templates
- [Users](#)
- [Workgroups](#)
- [Wrap-up Categories](#)

- [Wrap-up Codes](#)

The **View Access Control Groups** page displays ACGs hierarchy in the master view, and displays details of the currently selected ACG in the details view. You can take actions on the ACGs in the master view, such as edit, delete (not the default root), and you can add a new ACG.

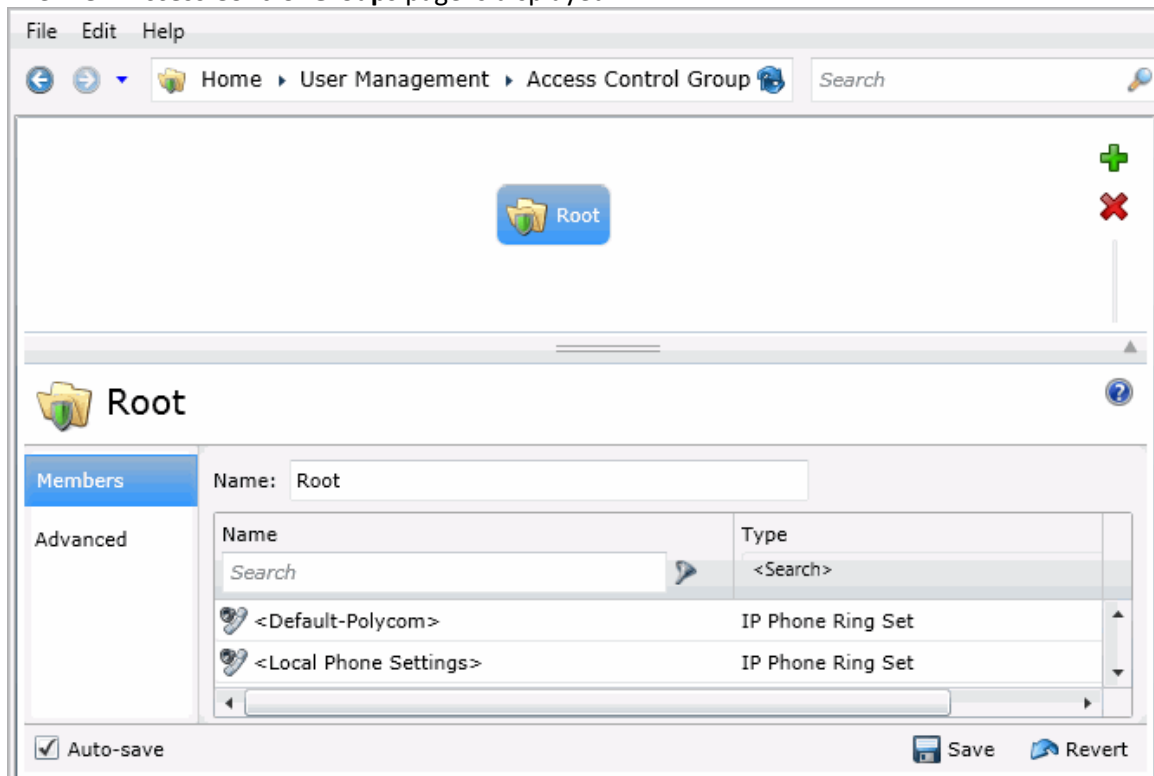
To view ACGs:

1. Click the **Access Control Groups** action under the **User Management** category, then click **View Access Control Groups**:



...or Click **View Access Control Groups** in the breadcrumbs if available.

2. The **View Access Control Groups** page is displayed.



3. The details of the selected ACG are displayed in the details view.

Related Topics

Introduction to Interaction Administrator

[Add an ACG](#)

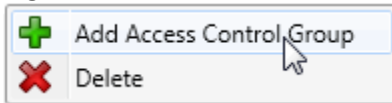
[User: Administrative Rights](#)

Add an ACG

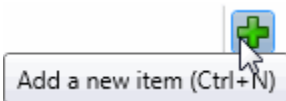
You can add a new ACG in Interaction Administrator . The ACG settings are configured in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

To add an ACG:

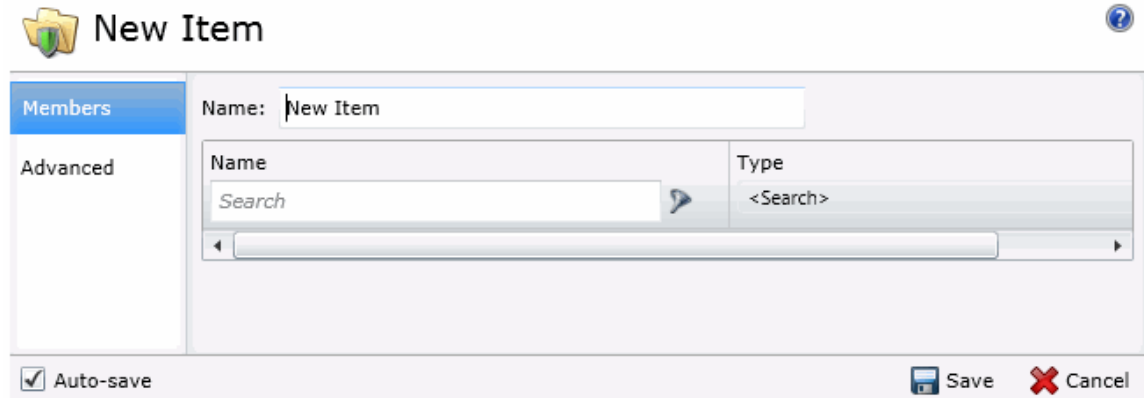
1. Right-click in the master view area and select **Add Access Control Group**:



...Or click the **New** button in the master view toolbar:



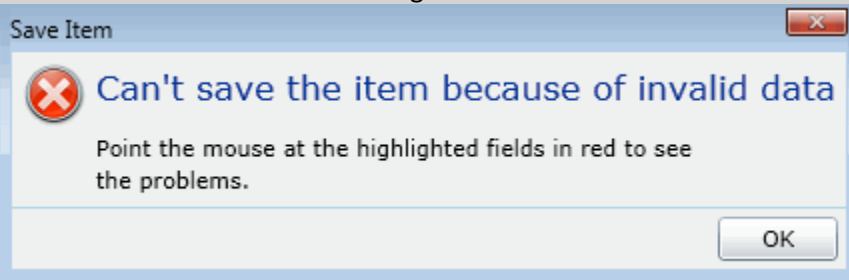
The **New Item** appears in the details view:



2. Complete the ACG configuration in the two details tabs. The links below open the topics containing procedures for completing each details tabs configuration:

- [Members](#)
- [Advanced](#)

Note: To save a new ACG, all required information must be entered. Incomplete or invalid information is shown with a message:



Related Topics

[Access Control Groups: Members](#)

[Access Control Groups: Advanced](#)

[Access Control Groups: Members Field Descriptions](#)

[Access Control Groups: Advanced Field Descriptions](#)

Access Control Groups: Members

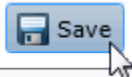
The Members details tab contains the name of the ACG and the items that belong to the group. Click the name of the details tab for field descriptions.

To complete the ACG's general information:

1. Click the **Members** details tab to display the details view.
2. Type the ACG Name. The name must be unique.

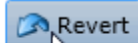
Name:

3. Save the new ACG.



Save the modified item (Ctrl+S)

If necessary, the new ACG or changes made to an existing ACG name can be reverted.



Revert the changes to the modified item

Note: The **Name** and **Type** area in the details view is empty.

Name	Type
<input type="text" value="Search"/>	<Search>

Items must be added to the ACG through the specific item's configuration. After an item is added to the ACG, it is displayed like:

Name:

Name	Type
<input type="text" value="Search"/>	<Search>
<Default Registration Group>	IP Phone Registration Group
<Default Secure Registration Group>	IP Phone Registration Group
<Default-Polycom>	IP Phone Ring Set
<Local Phone Settings>	IP Phone Ring Set
Administration	Workgroup
Administrator	Role
Agent	Role

Related Topics

[Add an ACG](#)

[Access Control Groups: Advanced](#)

[Access Control Groups: Members Field Descriptions](#)

[Access Control Groups: Advanced Field Descriptions](#)

Access Control Groups: Members Field Descriptions

This topic contains the descriptions for each field in the **Members** details view under the **View Access Control Groups** page.

Members

When an item (member) is added to an ACG, the user's assigned to the ACG's, take on those rights. The details view here shows the name of the item (Administration) and associated item type (Workgroup):

Name	Type
<input type="text" value="Search"/>	<Search>
<Default-Polycom>	IP Phone Ring Set
<Local Phone Settings>	IP Phone Ring Set
Administration	Workgroup
Administrator	Role

To search for a specific item in the list, type a digit or digits and select the filter type to apply:

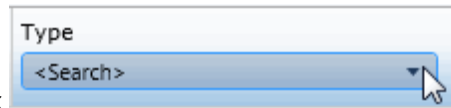
Contains

Starts with

Matches whole word

Type

<Search>

To search by item type, click , and select the item type from the list:

<Search>

<Search>

Account Code

Client Template

IP Phone

IP Phone Registration Group

IP Phone Ring Set

IP Phone Template

Keyword Set

Location

Password Policy

Role

Schedule

Skill

Station


Station Group

User

Workgroup

Wrap Up Category

All items belonging to an ACG are displayed in this view only list. Items cannot be added to or deleted from this view. Items must be added or deleted from ACGs from the item configuration. For example, a user must be added to an ACG through the **Access Control Group** field in user configuration:

Access Control Group: 

Related Topics

[Add an ACG](#)

[Access Control Groups: Members](#)


[Access Control Groups: Advanced](#)

[Access Control Groups: Advanced Field Descriptions](#)

Access Control Groups: Advanced

The Advanced details tab contains the custom attributes and history of the ACG. Click the name of the details tab for field descriptions.

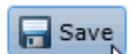
To complete the ACG's advanced information:

1. Click the **Advanced** details tab to display the details view.
2. Click Custom Attributes section expander to display (or hide) the custom attributes section's contents, and complete the following information:
 - To create a custom attribute, click  and type an attribute name. You must also enter a value for the new attribute.

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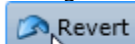
3. Click History section expander to display (or hide) the history section's contents, and complete the following information:
 - View the **Created** and **Modified** dates for this ACG.
 - Type or view information in the Notes field for the ACG.

4. Save the new ACG or modified ACG.
 - View the **Created** and **Modified** dates for this ACG.
 - Type or view information in the Notes field for the ACG.



Save the modified item (Ctrl+S)

If necessary, the new ACG or changes made to an existing ACG can be reverted.



Revert the changes to the modified item

Related Topics

[Add an ACG](#)

[Access Control Groups: Members](#)

[Access Control Groups: Members Field Descriptions](#)

Access Control Groups: Advanced Field Descriptions

This topic contains the descriptions for each field in the **Advanced** details view under the **View Access Control Groups** master view.

Custom Attributes

Use customized attributes to reference other variables and settings through the IceLib interface. When adding a new attribute, use a unique name, otherwise an existing attribute with the same name will be overwritten. Click **Edit** to change the value of an existing custom attribute, or **Delete** to delete an existing custom attribute.

History

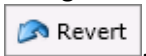
History provides a way to manually document configuration changes and when they occurred. Changes made in Interaction Administrator are also automatically logged in the Interaction Administrator Change Notification Log (Log ID 7). Later, authorized users can run reports against this log to summarize all configuration changes.

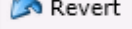
Created

This date is automatically set when the user creates the initial configuration for this ACG. If the ACG was initially created during setup, the date could be blank.

Modified

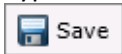
This date is automatically updated each time the user clicks the OK button, presumably after making changes to the ACG configuration. To avoid updating this date, exit the property sheet by clicking



Note: If you click , none of the changes made to this ACG since the changes were last saved are preserved.

Notes

Type notes about configuration settings and changes. If you change the configuration and click



, the **Last Modified** date is updated.

You must manually enter the date beside each entry in the **Notes** field to identify the date of each note.

Related Topics

[Add an ACG](#)

[Access Control Groups: Members](#)

[Access Control Groups: Advanced](#)

[Access Control Groups: Members Field Descriptions](#)

Wrap-up Codes

The **View Wrap-up Codes** page displays wrap-up codes in a list in the master view, and displays details of the currently selected wrap-up code in the details view. You can take actions on the wrap-up codes in the list view, such as add, delete, and copy and paste, and you can add a new code. You can change the way the list is displayed, such as change visible columns, sort by column, and filter.

To view wrap-up codes:

1. Click the **View Wrap-up Codes** action under the **User Management** category or click **View Wrap-up Codes** in the breadcrumbs, if available.
2. The **View Wrap-up Codes** page appears.
3. The details of the selected wrap-up code appear in the details view.

Related Topics

[Add a wrap-up code](#)

Add a wrap-up code

You can add a wrap-up code in Interaction Administrator. The wrap-up codes settings are configured in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

To add a wrap-up code:

1. Right-click in the master view area and select **New** or click the **New** button in the master view toolbar.
2. Complete the wrap-up code configuration in the details tabs.

Related Topics

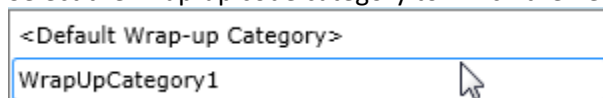
[Configure a wrap-up code](#)

Configure a wrap-up code

The wrap-up codes details tab contains name, digits, label, category, access control group, and multi-language label information the code. Click the name of the details tab for field descriptions.

To configure a wrap-up code:

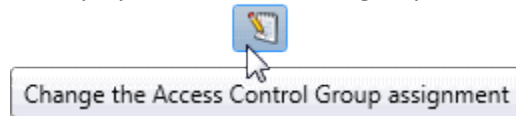
1. Click the **Configuration** details tab to display the details view.
2. Complete the following information in the first section:
 - Type the **Name** of the new code.
 - Type the **Code label**. This is label appears in the CIC clients.
 - Select the wrap-up code category to which the new code belongs.



The screenshot shows a dropdown menu with a light blue border. The text '<Default Wrap-up Category>' is visible at the top. Below it, the option 'WrapUpCategory1' is selected and highlighted in a darker blue. A mouse cursor is positioned over the selected option.

The default category is <Default Wrap-up Category>. New categories are defined in Wrap-up Category configuration.

- To display the access control groups membership available, click the icon,



and select the **Access Control Group** from the list to assign to the code.

- If the outbound call reached the intended party, this option is applied to the wrap-up code. *This setting is reserved for Interaction Dialer use.*
- Click the **Multi-language labels** section expander to display (or hide) the language section's contents, and complete the following information:

- Click  to open the **Add languages** dialog box.

Select one or more languages in the **Available** items list, and click **Add** to assign the language to the **Selected** items list. You can also click **Add all** to add all languages. To filter the list of languages, type in the filter field above the list.

- Type in the string value associated with the language selected.

Language	Value
Azeri (Cyrillic)	Azeri_translation
Bulgarian (Bulgaria)	Bulgarian_translation



Note: You must specify a value or the multi-language label is not saved.

- Save the new code or modified code.

If necessary, the new code or changes made to an existing code can be reverted.

Related Topics

[Wrap-up codes: configuration field descriptions](#)

Wrap-up codes: configuration field descriptions

This topic contains the descriptions for each field in the **Configuration** details view under the **View Wrap-up Codes** page.

Name

This is a descriptive label associated with a code and is displayed in the CIC clients. A wrap-up code is comprised of three parts: the wrap-up code name, a digit string, and a label. The label is displayed in the CIC clients. This wrap-up code name also appears in the reports.

Digits

This is a sequence of unique digits for the new wrap-up code.

Code Label

This is a textual label for the wrap-up code. The description is displayed next to the wrap-up code in Interaction Administrator list view.

Category

This is the wrap-up code category that the new code belongs. The category groups the codes. For example, the code may indicate a "Password Reset", and the code may belong to the "Finance Department" category. Categories must be configured to appear in wrap-up configuration.

Access Control Group

An access control group (ACG) is a group of administrative rights. When an ACG is added to the code, the code takes on those ACG's rights. The code can be assigned to only one ACG.

Note: Access Control Groups appear if they have been configured in your environment. If Access Control Groups have not been configured, this field is not displayed.

The Right Party Was Contacted

This field is reserved for Interaction Dialer use.

Multi-language Labels

The language field indicates the language to use for the translation of the code label. The value is a string that represents the language used and is displayed in the CIC clients0.


Related Topics

[Configure a wrap-up code](#)

Configure advanced information

The **Advanced** details tab contains the custom attributes and history of the wrap-up code. Click the name of the details tab for field descriptions.

To configure advanced information:

1. Click the **Advanced** details tab to display the details view.
2. Click the **Custom Attributes** section expander to display the custom attributes section's contents and then complete the following information:
 - To create a custom attribute, click  and type an attribute name. You must also enter a value for the new attribute.

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3. Click **History** section expander to display (or hide) the history section's contents, and complete the following information:
 - View the **Created** and **Modified** dates for this wrap-up code.
 - Type or view information in the **Notes** field for the wrap-up code.

4. Save the new wrap-up code or modified wrap-up code.

If necessary, the new wrap-up code or changes made to an existing wrap-up code be reverted.

Related Topics

[Wrap-up codes: advanced field descriptions](#)

Wrap-up codes: advanced field descriptions

This topic contains the descriptions for each field in the **Advanced** details view under the **View Wrap-up Codes** page.

Custom Attributes

Use customized attributes to reference other variables and settings through the IceLib interface. When adding a new attribute, use a unique name, otherwise an existing attribute with the same name will be overwritten. Click **Edit** to change the value of an existing custom attribute, or **Delete** to delete an existing custom attribute.

History

History provides a way to manually document configuration changes and when they occurred. Changes made in Interaction Administrator are also automatically logged in the Interaction Administrator Change Notification Log (Log ID 7). Later, authorized users can run reports against this log to summarize all configuration changes.

Created

This date is automatically set when the user creates the initial configuration for this code. If the code was initially created during setup, the date could be blank.

Modified

This date is automatically updated each time you click **OK**. To avoid updating this date, exit the property sheet by clicking **Revert**.

Note: If you click **Revert**, none of your changes are saved.

Notes

Type notes about configuration settings and changes. If you change the configuration and click **Save**, the **Last Modified** date is updated.

To identify the date of a specific note, you must manually enter the date beside each entry in the **Notes** field.

Related Topics

[Configure advanced information](#)

Wrap-up Categories

The **View Wrap-up Categories** page displays wrap-up categories in a list in the master view, and displays details of the currently selected wrap-up category in the details view. You can take actions on the wrap-

up categories in the list view, such as add, delete, and copy and paste, and you can add a new category. You can change the way the list is displayed, such as change visible columns, sort by column, and filter.

Note: You cannot delete the default wrap-up category.

To view wrap-up categories:

1. Click the **View Wrap-up Codes** action under the **User Management** category or Click **View Wrap-up Categories** in the breadcrumbs, if available.
2. The **View Wrap-up Categories** page appears.
3. The details of the selected wrap-up category appear in the details view.

Related Topics

[Add a wrap-up category](#)

[Configure a wrap-up category](#)

Add a wrap-up category

You can add a new wrap-up category in Interaction Administrator Web Edition. The wrap-up category settings are configured in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

To add a new wrap-up category:

1. Right-click in the master view area and select **New** or click the **New** button in the master view toolbar.
2. Complete the wrap-up category configuration in the details tabs.

Related Topics

[Configure a wrap-up category](#)

Configure a wrap-up category

The wrap-up categories details tab contains name, category label, access control group, record status, phone number status, options, and multi-language label information the category. Click the name of the details tab for field descriptions.

To configure a wrap-up category:

1. Click the **Configuration** details tab to display the details view.
2. Complete the following information in the first section:
 - a. Type the **Name** of the new category.
 - b. Type the **Category label**. This is label appears in the CIC clients.
 - c. To display the access control groups membership available, click the icon,




Change the Access Control Group assignment


and select the **Access Control Group** from the list to assign to the category.


- d. **Record status:** *This setting is reserved for Interaction Dialer use.*

- e. **Phone number status:** *This setting is reserved for Interaction Dialer use.*
 - f. Select **The interaction connected to an actual person** check box to indicate that the interaction associated to this wrap-up category was answered by a person (versus voice mail, recorded message, and so on). *This setting is reserved for Interaction Dialer use.*
 - g. **Increment the attempts counter:** *This field is reserved for Interaction Dialer use.*
 - h. **The interaction was successful:** *This field is reserved for Interaction Dialer use.*
3. Click the **Multi-language labels** section expander to display the language section's contents, and complete the following information:

- 4.
 - a. Click  to open the **Add languages** dialog box.
 - b. Select one or more languages in the **Available** items list, and click **Add** to assign the language to the **Selected** items list. You can also click **Add all** to add all languages. To filter the list of languages, type in the filter field above the list. Type in the string value associated with the language selected.

Language	Value
Azeri (Cyrillic)	Azeri_translation
Bulgarian (Bulgaria)	Bulgarian_translation





Note: You must specify a value or the multi-language label is not saved.

- 4. Save the new category or modified category.
- If necessary, the new category or changes made to an existing category can be reverted.

Related Topics

[Wrap-up categories: configuration field descriptions](#)

Wrap-up categories: configuration field descriptions

This topic contains the descriptions for each field in the **Configuration** details view under the **View Wrap-up Categories** page.

Name

This is a descriptive label that is associated with a category and that is displayed in the CIC clients. A wrap-up category is comprised of two parts: the wrap-up category name and the label. The label is displayed in the CIC clients. This wrap-up category name also appears in reports.

Category Label

This is a textual label for the wrap-up category. The description is displayed next to the wrap-up category in the Interaction Administrator list view.

Category

This is the wrap-up code category that the wrap-up codes are assigned. The category groups the codes. For example, the code may indicate a "Password Reset", and the code may belong to the "Finance Department" category. Codes must be configured to appear in wrap-up code configuration.

Access Control Group

An access control group (ACG) is a group of administrative rights. When an ACG is added to the category, the category and the code associated to the category take on those ACG's rights. The category can be assigned to only one ACG.

Note: Access Control Groups appear if they have been configured in your environment. If Access Control Groups have not been configured, this field does not appear.

Record Status

This field is reserved for Interaction Dialer use.

Phone Number Status

This field is reserved for Interaction Dialer use.

The Interaction Connected to an Actual Person

This field is reserved for Interaction Dialer use.

Increment the Attempts Counter

This field is reserved for Interaction Dialer use.

The Interaction was Successful

This field is reserved for Interaction Dialer use.

Multi-language Labels

The language field indicates the language to use for the translation of the category label. The value is a string that represents the language used and is displayed in the CIC clients.

Related Topics


[Configure a wrap-up category](#)

Configure advanced information

The **Advanced** tab information for custom attributes and history for the wrap-up category. Click the name of the details tab for field descriptions.

To configure advanced information

1. Click the **Advanced** detail tab to display the details view.
2. Click **Custom Attributes** section expander to display (or hide) the custom attributes section's contents, and complete the following information:

- To create a custom attribute, click  and type an attribute name. You must also enter a value for the new attribute.

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3. Click **History** section expander to display (or hide) the history section's contents, and complete the following information:

- View the **Created** and **Modified** dates for this category.
- Type or view information in the **Notes** field for the category.

4. Save the new code or modified category.

If necessary, the new category or changes made to an existing category can be reverted.

Related Topics

[Wrap-up categories: advanced field descriptions](#)

Wrap-up categories: advanced field descriptions

This topic contains the descriptions for each field in the **Advanced** details view under the **View Wrap-up Categories** page.

Custom Attributes

Use customized attributes to reference other variables and settings through the IceLib interface. When adding a new attribute, use a unique name, otherwise an existing attribute with the same name will be overwritten. Click **Edit** to change the value of an existing custom attribute, or **Delete** to delete an existing custom attribute.

History

History provides a way to manually document configuration changes and when they occurred. Changes made in Interaction Administrator are also automatically logged in the Interaction Administrator Change Notification Log (Log ID 7). Later, authorized users can run reports against this log to summarize all configuration changes.

Created

This date is automatically set when the user creates the initial configuration for this category. If the category was initially created during setup, the date could be blank.

Modified

This date is automatically updated each time the user clicks the **OK** button, presumably after making changes to the category configuration. To avoid updating this date, exit the property sheet by clicking **Revert**.

Note: If you click **Revert**, none of the changes made to this category since the changes were last saved are preserved.

Notes

Type notes about configuration settings and changes. If you change the configuration and click **Save**, the **Last Modified** date is updated.

You must manually enter the date beside each entry in the **Notes** field to identify the date of each note.

Related Topics

[Configure advanced information](#)

Account Codes

You can add special codes to CIC that can be used to associate outgoing and incoming calls. An account code is an identifying set of numbers assigned to an account name. Once users have access to an account code, they can add it to a call so that it can be tracked and reported in standard reports.

Account code authorization can be given to users, and members of a workgroup or role. As an example, suppose you want a specific department to track all outgoing calls placed to a specific customer. Assign the members of that department to a workgroup or role, and give them access to account codes. You can now track the calls made by that department to a specific customer.

Because account code data is stored in call detail and account code mirror tables, your CIC administrator can generate reports that summarize calls by user or by date.

Using Interaction Administrator Web Administrator, you can set up account codes (up to a maximum of 50 digits long) at the system, default user, user, or workgroup level. Once account codes are set up, users can assign them to incoming and outgoing calls.

Note: Because account codes are treated as strings, not numbers, by the database program, account codes with leading zeros will appear first in reports. For example, account numbers 1, 3, 20, 213, 0214, 1234, and 001235 would be sorted as 001235, 0214, 1, 1234, 20, 213, and 3.

The **View Account Codes** page displays account codes in a list in the master view, and displays details of the currently selected account code in the details view. You can take actions on the account codes in the list view, such as add, delete, and copy and paste, and you can add a new account codes. You can change the way the list is displayed, such as change visible columns, sort by column, and filter.

Note: In order for account codes to work, the **Use advanced dialing options (account code, workgroup)** option must be selected in the CIC clients. This option appears on the **Configuration** page for calls.

To view account codes:

1. Click the **View Account Codes** action under the **User Management** category or Click **View Account Codes** in the breadcrumbs if available.
2. The **View Account Codes** page appears.
3. The details of the selected account code are displayed in the details view.

Related Topics

Introduction to Interaction Administrator

[Enable Account Codes](#)

Add an Account Code

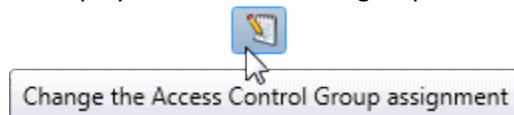
You can add an account code in Interaction Administrator Web Edition. The account codes settings are configured in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

To add an account code:

1. Right-click in the master view area and select **New** or click the **New** button in the master view toolbar.

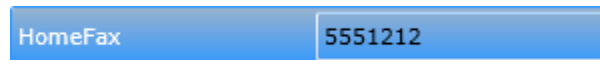
The **New Item** appears in the details view.

2. Complete the following general account code configuration
 - Type the **Code** representing the account code.
 - Type a **Description** for the new account code. This information appears in the CIC clients.
 - To display the access control groups membership available, click the icon,



and select the **Access Control Group** from the list to assign to the skill.

3. Click **Custom Attributes** section expander to display the custom attributes section's contents, and complete the following information:
 - To create a custom attribute, click **+** and type an attribute name. You must also enter a value for the new attribute.



4. Click **History** section expander to display (or hide) the history section's contents, and complete the following information:
 - View the **Created** and **Modified** dates for this code.
 - Type or view information in the **Notes** field for the code.
5. Save the new account code or modified account code.

If necessary, you can revert the new account code or the changes that you made to an existing account code.

Notes: To use account codes, they must be enabled at the system level, enabled for each dial plan object, and the user must have access to account codes.

To save a new account code, all required information must be entered. Details tabs containing incomplete or erroneous information, are shown with an error message.

Related Topics

[Account Codes: Field Descriptions](#)

Account codes: field descriptions

This topic contains the descriptions for each field in the **Account Codes** details view under the **View Account Codes** page.

Code

This is a set of numbers zero through 9 (up to a maximum of 50 digits) to use as an account code. These numbers are associated with the account name.

Note: Because account codes are treated as strings, not numbers, by the database program, account codes with leading zeros will appear first in reports.

For example, account numbers 1, 3, 20, 213, 0214, 1234, and 001235 would be sorted as 001235, 0214, 1, 1234, 20, 213, and 3.

Description

Type a name for the account code. The name is added next to the account code shown in Interaction Administrator list view.

Access Control Group

An access control group (ACG) is a group of administrative rights. When an ACG is added to the account code, the account code takes on those ACG's rights. The account code can be assigned to only one ACG.

Note: Access Control Groups appear if they have been configured in your environment. If Access Control Groups have not been configured, this field is not displayed.

Custom Attributes

Use customized attributes to reference other variables and settings through the IceLib interface. When adding a new attribute, use a unique name, otherwise an existing attribute with the same name will be overwritten. Click **Edit** to change the value of an existing custom attribute, or **Delete** to delete an existing custom attribute.

History

History provides a way to manually document configuration changes and when they occurred. Changes made in Interaction Administrator are also automatically logged in the Interaction Administrator Change Notification Log (Log ID 7). Later, authorized users can run reports against this log to summarize all configuration changes.

Created

This date is automatically set when the user creates the initial configuration for this account code. If the account code was initially created by the IC setup, the date could be blank.

Modified

This date is automatically updated each time the user clicks the OK button, presumably after making changes to the account code configuration. To avoid updating this date, exit the property sheet by clicking **Revert**.

Note: If you click **Revert**, none of the changes made to this account code since the changes were last saved are preserved.

Notes

Type notes about configuration settings and changes. If you change the configuration and click **Save**, the **Last Modified** date is updated.

You must manually enter the date beside each entry in the **Notes** field to identify the date of each note.

Account Codes Global Settings

Enable account codes

You can configure global account code settings in Interaction Administrator Web Edition. To use account codes, they must be enabled here. The account code global settings are configured in the master view. You can click the section expanders to display or hide the sections' contents.

Note: To use account codes, they must also be enabled for each dial plan object, and the user must have access to account codes.

To enable account codes:

1. Select the **Enable Account Codes** check box.
2. Click Custom Attributes section expander to display (or hide) the custom attributes section's contents, and complete the following information:
 - To create a custom attribute, click **+** and type an attribute name. You must also enter a value for the new attribute.

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3. Click History section expander to display (or hide) the history section's contents, and complete the following information:
 - View the **Created** and **Modified** dates for this code.
 - Type or view information in the **Notes** field for the code.
4. Save the account code configuration.

If necessary, you can revert your configuration changes.

Related Topics

[Account Codes Settings: Field Descriptions](#)

Account code settings: field descriptions

This topic contains the descriptions for each field in the **Account Code Settings** master view under the **Account Code Global Settings** page.

Enable Account Codes

This setting activates the account codes feature.

Custom Attributes

Use customized attributes to reference other variables and settings through the IceLib interface. When adding a new attribute, use a unique name, otherwise an existing attribute with the same name will be overwritten. Click **Edit** to change the value of an existing custom attribute, or **Delete** to delete an existing custom attribute.

History

History provides a way to manually document configuration changes and when they occurred. Changes made in Interaction Administrator are also automatically logged in the Interaction Administrator Change Notification Log (Log ID 7). Later, authorized users can run reports against this log to summarize all configuration changes.

Created

This date is automatically set when the user creates the initial configuration for this account code configuration. If the account code configuration was initially created during setup, the date could be blank.

Modified

This date is automatically updated each time the user clicks the OK button, presumably after making changes to the account code configuration. To avoid updating this date, exit the property sheet by clicking **Revert**.

Note: If you click **Revert**, none of the changes made to this account code configuration since the changes were last saved are preserved.

Notes

Type notes about configuration settings and changes. If you change the configuration and click **Save**, the **Last Modified** date is updated.

You must manually enter the date beside each entry in the **Notes** field to identify the date of each note.

Related Topics

[Enable Account Codes](#)

DID/DNIS Mappings

If your phone lines provide the called number as part of the incoming call packet (for example, DID (Direct Inward Dialing) or DNIS (Dialed Number Identification Service)), you can map the called number directly to a CIC user, workgroup, or station queue. When a new call to one of the mapped numbers arrives, CIC immediately routes that call to the mapped destination. To do this, you simply create the appropriate call routing map using the DID/DNIS Configuration page and the DID/DNIS Route page (which appears when you click Add on the DID/DNIS page).

The **View DID/DNIS Mappings** page displays mappings in a list in the master view. You can take actions on the mappings in the master view, such as edit, delete or copy, and you can add a new mapping. You can change the way the list is displayed, such as change visible columns, sort by column, and filter.

To view Mappings:

1. Click the **View Mappings** action under the **System Configuration** category.

...or Click **View DID/DNIS Mappings** in the breadcrumbs if available.
2. Click the mapping you want to view and click an action to edit the mapping.

Related Topics

[Add a DID/DNIS Mapping](#)


[DID/DNIS Mappings: Configuration](#)

[DID/DNIS Mappings: Field Descriptions](#)

Add a DID/DNIS Mapping

You can add a new DID/DNIS mapping. The mapping settings are configured in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

To add a DID/DNIS mapping:

1. Click  to the right of the master view area.
2. Complete the mapping configuration in the mapping details view on the right.
 - [DID/DNIS Mappings Configuration](#)

Note: To save a new role, all required information must be entered. Details views containing incomplete or erroneous information cannot be saved until the required information is entered.

Related Topics


[DID/DNIS Mappings](#)

[DID/DNIS Mappings: Configuration](#)

DID/DNIS Mappings: Configuration

The details view contains information, single and multiple mappings, identifiers, and destinations for the mappings. Click the configuration details view for field descriptions.

To complete the mapping's configuration information:

1. Type the **Description** of the schedule.
2. Specify if the mapping is **single** or **multiple**.
3. Select the type of identifier; **Simple mapping**, **Substitute prefix**, or **Replace N digits**. After selecting the type, type the identifier information in the text box to the right.
4. Select the **Defer substitution until DID/DNIS is received** check box to defer the transfer if the identifier is substitute or replace.
5. To filter the destinations list, click  and select the filter type to apply to the list and type into the **Destination** search text box. You can also search on **Type** and **Extension**.

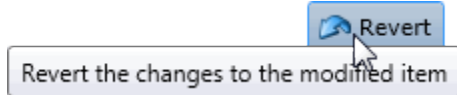
Contains
 Starts with
 Matches whole word

At least one destination must be specified for this mapping.

6. Save the new or modified mapping.



If necessary, the new mapping or changes made to an existing mapping can be reverted.



Related Topics

[DID/DNIS Mappings](#)

[Add a DID/DNIS Mapping](#)

[DID DNIS Mappings Configuration Field Descriptions.htm](#)

DID/DNIS Mappings: Field Descriptions

This topic contains the descriptions for each field in the **Configuration** details view under the **View DID/DNIS Mappings** page.

Description

This is a brief description of this DID/DNIS number and the purpose of the DID/DNIS entry. The text entered in this box appears on the DID/DNIS mappings master view under the Description column. It can provide useful documentation for the CIC administrator who has to manage the call routing later.

Note: There is a tool to process the DID/DNIS routing table from Interaction Administrator. The tool takes the DNIS string of a telephone call and returns a scoped queue name based on the DID/DNIS configuration in Interaction Administrator. For more information, see the *Interaction Designer* help.

Single or Multiple Mappings

This option determines the number of destinations that can be set for this mapping.

DID/DNIS Identifier

Simple: Select this method if you have only a few call routes to create, or the DNIS numbers have different prefixes. This method allows you to add one call route to the map table at a time.

Substitute Prefix: Select this method if you have a range of DNIS numbers, all with the same prefix and a group of extensions with the same number of digits. This method allows you to build a map table for a large range of extensions with the same DNIS prefix at one time. The DNIS prefix can be three or four digits, depending on the DNIS numbers you have reserved, and whether the extensions are all three-digit numbers or all four-digit numbers.

Replace N digits: Select this method if you have a range of DNIS numbers with the same prefix, but the DNIS numbers map to extensions with one, two, three, or four digits. You provide a phone number template and this method builds a map table by substituting the number of digits in each extension (N) for that same number of digits at the end of the template phone number. The template DNIS number is usually a seven-digit phone number using the first three digits of the prefix in the DNIS numbers.

Deferred substitution until DID/DNIS is received

This option provides flexibility allowing you to defer the lookup of the destination for the call. Instead of selecting the destination from one of the straight table maps created with the Prefix or Replace methods, this option tells CIC to get the DNIS number and then sequentially compare it with each number in the list until it finds a match. It then assigns the call to the matching queue, regardless of the user, workgroup, or station name currently assigned to that queue.

Destination

Calls with this DID/DNIS number will proceed to the extension, user queue, workgroup queue, or station queue specified in this property.

Related Topics

[Add a DID/DNIS Mapping](#)

[DID/DNIS Mappings: Configuration](#)

Client Templates

To simplify the configuration of Interaction Desktop clients, CIC provides the Client Templates feature. An authorized CIC client user creates client templates on the IC server. Then, an administrator assigns the client templates to roles, workgroups, or users by publishing them in the **Client Templates** container.

Notes:

- A user needs the **Manage Client Templates** security right to create or edit templates for other CIC client users. An administrator needs the **Client Templates** administrator access right to use Interaction Administrator to assign these templates to selected CIC client users.
- The Client Templates feature is designed to enable the one-time application of a template to a bulk set of users, roles, or workgroups. It is not designed to facilitate incremental, ongoing changes to selective users, roles, or workgroups.
- If you change a template, you must republish the template in order for the changes to take effect on the CIC clients.

Related Topics

[Publish a client template](#)

[User: Security Rights Field Descriptions](#)

Publish a client template

You can publish a client template to make it available to roles, workgroups, or user.

To publish a client template:

1. In the **People** container, open the **Client Templates** subcontainer. The **Client Templates** page appears.
2. Under **Select template targets**, do one of the following:
 - Click **Select Users** to select the users who should receive the template.
 - Click **Select Roles** to select the roles that should receive the template. All of the users that have the roles that you select will receive the template.
 - Click **Select Workgroups** to select the workgroups that should receive the template. All of the users in the workgroups that you select will receive the template.
3. Under **Select a template to apply**, click the template that you want to publish. The following predefined templates are available:
 - All Channel Agent. This template provides all available channels to the agent.
 - Basic Chat Agent. This template enables the agent to participate in online chat sessions.
 - Basic Email Agent. This template enables the agent to send and receive emails.
 - Basic Email Agent with preview. This template enables the agent to send and receive emails and to preview incoming calls.
 - Default template. This is the standard template that is automatically assigned to all new users.
 - Default ICM. This is the standard template that is automatically assigned to all new ICM users.
 - Multi-Channel Agent: This template enables the agent to use chats and emails.

Tip: You can search for templates by name and by application.

4. Click **Apply Template**.

Related Topics

[Overview of client templates](#)

Managed IP Phones

CIC systems using SIP can reduce initial IP phone configuration time and ongoing maintenance with “managed IP phones”, where a provisioning subsystem manages all IP phone configuration in Interaction Administrator.

The **View Managed Phones** page displays managed phones in a list in the master view, and displays details of the currently selected phone in the details view. You can take actions on the phones in the list view, such as edit, delete or copy, and you can add a new phone. You can change the way the list is displayed, such as change visible columns, sort by column, and filter.

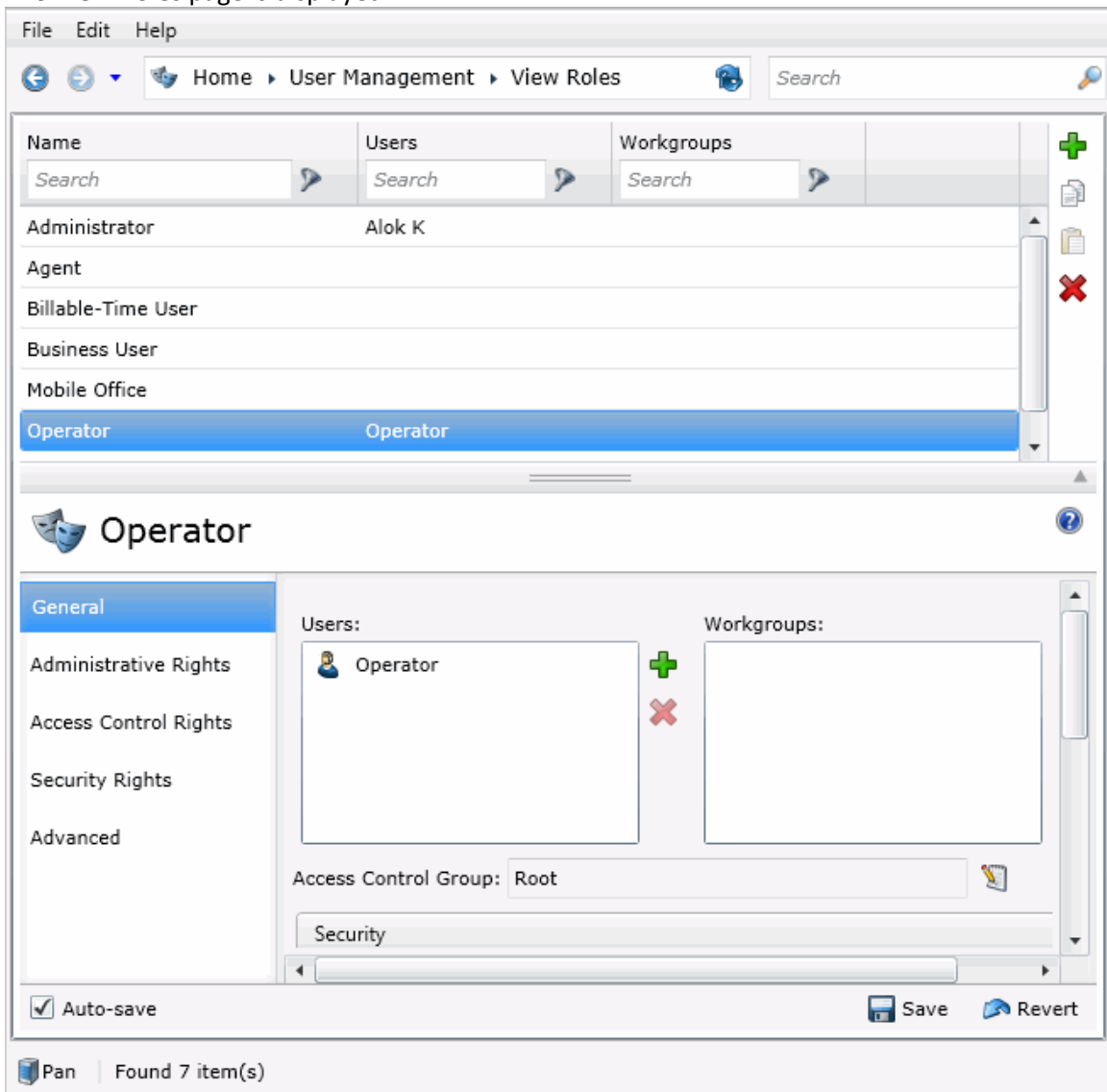
To view roles:

1. Click the **View Roles** action under the **User Management** category:



...or Click **View Roles** in the breadcrumbs if available.

2. The **View Roles** page is displayed.



3. The details of the selected role are displayed in the details view.

Related Topics

Introduction to Interaction Administrator Web Edition

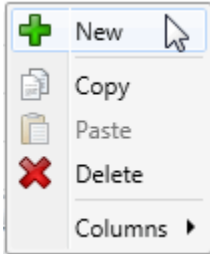
[Add a Role](#)

Add a Managed Phone

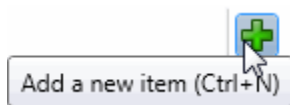
You can configure managed phone settings in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

To add a managed phone:

1. Right-click in the master view area and select **New**:



...Or click the **New** button in the master view toolbar:



2. In the detail view, type the **Phone Name**.
3. To use a template for the new managed phone, click **Create from a template**, and select the template from the drop-down box. Templates in this list have already been [configured](#). Once you select the template, the new phone is created based on the template's settings.
4. To create a new phone manually, click **Create from the following settings** and perform the following tasks:
 - Select the **Type** of managed IP phone from the drop-down menu.
 - Select the **Manufacturer** from the drop-down menu.
 - Select the **Model** from the drop-down menu.
 - Select the **Time Zone** from the drop-down menu.
5. Complete the managed phone configuration in the three details tabs. The links below open the topics containing procedures for completing each details tab's configuration:
 - [Configuration](#)
 - [Advanced](#)
 - [Utilities](#)
6. **Note:** To save a new managed phone, all required information must be entered. You cannot save the configuration if there is incomplete or erroneous information.

Related Topics

[Managed Phones](#)


[Managed Phones: Configuration.htm](#)

[Managed Phones: Configuration Field Descriptions](#)

Managed Phones: Configuration

The details view contains information about configuring managed IP phones, using templates or creating them manually.

To complete the mapping's configuration information:

1. Click the [Configuration](#) details tab to display the details view.
2. Complete the following information in the first section:
 - Type the **Network ID**.
 - Select the **Location** from the drop-down box.
 - Select the **Registration Group** from the drop-down box.
 - Select the **Time Zone** from the drop-down menu.
 - Click **This phone is enabled** to make the phone active.
3. Click the Station Appearances section expander to display (or hide) the language section's contents, and complete the following information:
 - Click  to open the Add appearances dialog box, and select the appearances to add to this managed phone.
4. Save the new or modified phone.



Save the modified item (Ctrl+S)

If necessary, the new phone or changes made to an existing phone can be reverted.



Revert the changes to the modified item

Related Topics

[Managed Phones](#)

[Add a Managed Phone](#)

[Managed Phones: Advanced Configuration](#)

[Managed Phones: Configuration Field Descriptions](#)

Managed Phones: Configuration Field Descriptions

This topic contains the descriptions for each field in the **Configuration** details view under the **View Managed Phones** page.

Phone Name

This is the unique name of this IP phone. Click **Browse** to locate an existing station.

Network ID

This is the full computer name for the IP phone. To make sure you get the full computer name, navigate to My Computer....Properties....Computer Name and note the **Full Computer Name**. For example: PattyJ.acme.com.

Location

This is the location of this phone. All station appearances are in this same location. Time Zone information is read from the location and used to set the phone time, DST settings, etc. By default, <Default Location> is used.

Note: If you enable regional dialing, and a change to this location results in duplicate extensions, an error message appears. Copy the list of extensions to the clipboard. Then paste the contents in a program that supports CSV (for example, Microsoft Excel). You can then sort the list to find the duplicates.

Registration Group

A registration group is required for every managed IP phone. The registration group defines the relationship between a physical phone and a user, including the user's contact information.

A registration group can be regular or external:

- For a regular registration entry you can specify a line, manually type in an entry, specify a proxy, or specify a DNS server. You can specify only one line for a regular registration group.
- For an external registration entry, you can manually type an entry or you can specify a DNS server.

Each registration group can include multiple registrations. Use the up and down arrow keys to change the order. The list of registrations is significant. A phone attempts to use the first registration in the list. If it fails, the phone attempts to use the next registration in the list, and so on.

Time Zone

The time zones listed are the same as Windows time zones. The managed IP phone will use this time zone to set the daylight saving time information. *The SIP Soft Phone does not support this time zone option.*

This phone is enabled

By default, this managed IP phone or managed IP phone is active. Clear the check box to make it inactive.

Station Appearances

This is a regular station appearance that is the default (or it's own appearance) of this managed IP phone. For example, ManagedIPPhone105 has a regular station appearance by default labeled ManagedIPPhone105 on this station. (The label can be edited.) Interaction SIP Station uses only one station appearance. Use this section to manage station appearances on the managed IP phone.

Related Topics

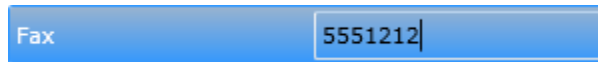
[Managed Phones](#)

Managed Phones: Advanced Configuration

The Advanced details tab contains the custom attributes and history of the managed phone. Click the name of the details tab for field descriptions.

To complete the wrap-up code's advanced information:

1. Click the **Advanced** details tab to display the details view.
2. Click Custom Attributes section expander to display the custom attributes section's contents, and complete the following information:
 - To create a custom attribute, click **+** and type an attribute name. You must also enter a value for the new attribute.



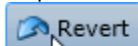
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3. Click History section expander to display (or hide) the history section's contents, and complete the following information:
 - View the **Created** and **Modified** dates for this managed phone.
 - Type or view information in the **Notes** field for the managed phone.
4. Save the new managed phone or modified managed phone.



Save the modified item (Ctrl+S)

If necessary, the new managed phone or changes made to an existing managed phone be reverted.



Revert the changes to the modified item

Related Topics

[Managed Phones](#)

[Add a Managed Phone](#)

[Managed Phones: Configuration](#)

[Managed Phones: Configuration Field Descriptions](#)

[Managed Phones: Advanced Field Descriptions](#)

Managed Phones: Advanced Field Descriptions

This topic contains the descriptions for each field in the **Advanced** details view under the **View Managed Phones** page.

Custom Attributes

Use customized attributes to reference other variables and settings through the IceLib interface. When adding a new attribute, use a unique name, otherwise an existing attribute with the same name will be overwritten. Click **Edit** to change the value of an existing custom attribute, or **Delete** to delete an existing custom attribute.

History

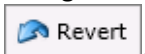
History provides a way to manually document configuration changes and when they occurred. Changes made in Interaction Administrator are also automatically logged in the Interaction Administrator Change Notification Log (Log ID 7). Later, authorized users can run reports against this log to summarize all configuration changes.

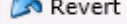
Created

This date is automatically set when the user creates the initial configuration for this code. If the code was initially created during setup, the date could be blank.

Modified

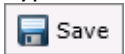
This date is automatically updated each time the user clicks the OK button, presumably after making changes to the code configuration. To avoid updating this date, exit the property sheet by clicking



Note: If you click  , none of the changes made to this code since the changes were last saved are preserved.

Notes

Type notes about configuration settings and changes. If you change the configuration and click



, the **Last Modified** date is updated.

You must manually enter the date beside each entry in the **Notes** field to identify the date of each note.

Related Topics

[Managed Phones](#)

[Add a Managed Phone](#)

[Managed Phones: Configuration](#)

[Managed Phones: Advanced Configuration](#)

[Managed Phones: Configuration Field Descriptions](#)

[Managed Phones: Utilities Configuration](#)

Managed Phones: Utilities Configuration

The [Utilities](#) details tab list actions that you can perform on this or all managed phones.

On this phone, you can:

- Reload now
- Reload later
- Cancel schedule reload
- Set to template
- Unprovision

On all phones, you can:

- Reload phones with pending changes

Related Topics

[Managed Phones](#)

[Add a Managed Phone](#)

[Managed Phones: Configuration](#)

[Managed Phones: Configuration Field Descriptions](#)

[Managed Phones: Advanced Configuration](#)

[Managed Phones: Advanced Field Descriptions](#)

[Managed Phones: Utilities Field Descriptions](#)

Managed Phones: Utilities Field Descriptions

This topic contains the descriptions for each option in the **Utilities** details view under the **View Managed Phones** page.

Action	Description
Reload Now	Reloads the selected managed IP phone now.
Reload Later	Reloads the selected managed IP phone at a scheduled time.
Cancel Scheduled Reload	Cancels a scheduled reload of managed IP phone and reverts phone to it's previous status.
Unprovision	Unprovisions the managed IP phone so that the phone can not be used. For example, you might want to unprovision a managed IP phone if an employee leaves the company, and a new employee is going to use the phone. Unprovision it and it will be waiting to be provisioned for the next person.

Set to Template	Sets the managed IP phone options to a specific template value.
Reload phones with pending changes.	Reloads all managed IP phones with pending changes that require a reload.

Related Topics

[Managed Phones](#)

[Add a Managed Phone](#)

[Managed Phones: Configuration](#)

[Managed Phones: Advanced Configuration](#)

[Managed Phones: Configuration Field Descriptions](#)

[Managed Phones: Utilities Configuration](#)

[Managed Phones: Advanced Field Descriptions](#)

Response Management

Response Management is a library of pre-defined responses, such as messages, URLs, and files. The CIC administrator creates and organizes pre-defined responses, and makes them available by granting [access control](#) rights to CIC client users. The user can use a stored response during a chat session, in a reply to an ACD-routed email message, or when responding to a callback request. These responses are available to users under administrator-defined folders in the Response Management window in a CIC client.

Note: Response Management appears in Interaction Connect and Interaction Desktop.

Response Organization

The organization of responses has three levels:

Library - A library (also called a server document) is the top-level collection of related response items. A library contains individual response items (such as a standard greeting or statement of your typical business hours) which can be organized into categories.

Category - A category is a folder in a response library. Categories are a way to organize individual response items in a library. Categories are optional.

Item - An item is a single response. There are two types of response items:

- Messages: Message items are stored text messages which can contain greetings, closings, and standard responses to common questions. A text message can also contain a working URL hyperlink.
- Files: File items are computer files that you can attach to an email message or send to external chat participants.

How recipients receive responses

- When an agent inserts a response file into an email, it appears as an attachment.
- When an agent inserts a response file into a chat, it appears as a file that the recipients can download.

To view response management items:

1. Click the **Response Management** sub-container under the **People** container.
2. Click the item you want to view in the master view to display the details of the selected schedule in the details view.

Related Topics

[Add a New Response Management Library](#)

[Add a Response Management Message](#)

[Add a Response Management File](#)


[Import a Response Management Document](#)

Add a Response Management File

Use a file item as a pointer to a file on the network that you frequently share with customers. You can add a response management file item to a library or category.

The item settings are configured in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

To create a file response item:

1. In the Response Management library or category details view, click the  to add a response item.
2. In the **Type** section, select **File**.
3. Do one of the following:
 - Click Browse. In the Open dialog box, locate and select the appropriate file and then click Open.
 - Use Windows Explorer to locate and select the appropriate file and then drag and drop the file in the **Drop file here** area.
4. In the **Name** text box, type a name for this file.

Note: Response Management provides a full-text search tool that uses the information in Name, Shortcut, and Labels along with the response item's content to find a response.

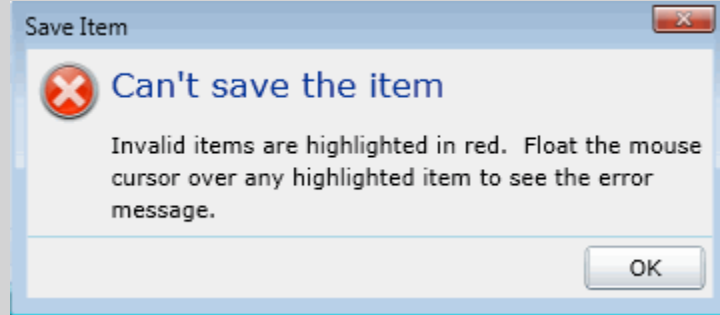
Tip: Name identifies the response item, but does not have to be unique. If you do not provide a name, it defaults to the first few characters of the file's directory path.

5. In the **Shortcut** text box, type a short name, abbreviation or code for this response.

Tip: Use this Shortcut to insert a response item where needed by typing the shortcut and then pressing Ctrl+Space. The shortcut does not have to be unique. For example, you could use the shortcut "TS" for all your files containing troubleshooting tips.

6. In the Labels text box, type a space-separated list of words that identify or classify this response item.
7. Click **Save**.

Note: To save a new item, all required information must be entered. Details tabs containing incomplete or erroneous information, are shown with an error message:



Tip: You can edit or delete multiple files or messages by selecting consecutive items with the Shift key and click, or multiple items with the Control key and click.

Related Topics

[Response Management](#)

[Add a Response Management Library](#)

[Add a Response Management Message](#)

Add a Response Management Library

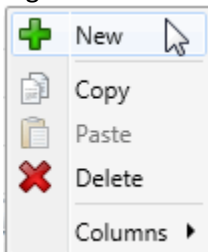
You can add a response management library that contains response categories and items. The item settings are configured in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

You must create a response management library before creating a [category](#) or an item.

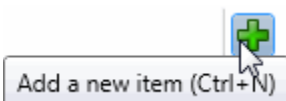
Note: Response Management appears in Interaction Connect and Interaction Desktop.

To create a library:

1. Right-click in the master view area and select **New**:



...Or click the **New** button in the master view toolbar:

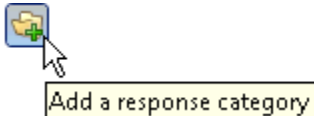


The **New Item** appears in the details view:

2. Type the **Name** representing the library.
3. Type a **Description** for the new library.
4. Save the library.

To add a category to a library:

1. In the master details view in a library, click the add a response category button.



2. Type a **Name** representing the category. This information appears in the CIC clients.
3. Save the category.

To add items to the library or category, see [Add a response management message](#) or [Add a response management file](#).

Related Topics

[Response Management](#)

[Add a Response Management Message](#)

[Add a Response Management File](#)


Add a Response Management Message

Use a message item to save standard text responses that CIC client users often refer to when interacting with customers. You can add a response management message item to a library or category.

Note: Response Management appears in Interaction Connect and Interaction Desktop.

The item settings are configured in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

To create a message response item:

1. In the Response Management library or category details view, click the  to add a response item.

2. In the **Type** section, select **Message**.
3. In the composition area, do one of the following:
 - Import an existing HTML file by clicking the Import HTML toolbar button. In the HTML Editor dialog box, locate an HTML file and click Open.

Tip: By default, the HTML Editor lists only files with an HTML extension. Use the file type drop-down list to include files with an HTML extension. You can also import plain text files (TXT extension).
4. Optionally, do any of the following in the editor:
3.
 - Format the text: Use any of the text formatting tools.
 - Add a hyperlink: Create a clickable link: Select some text in your message and click the Create Hyperlink tool, then supply a ScreenTip and a URL address.
 - Add an image: Select a place in your message and click the Add Image tool. Use any of the drag handles to resize the image.
 - Add a Response Macro: Response macros automatically insert a constant like today's date, an interaction attribute such as the customer's name, or another response item into your response at the time you use it. For more information, see the help for the CIC clients.
5. In the **Name** text box, type a name for this stored message.

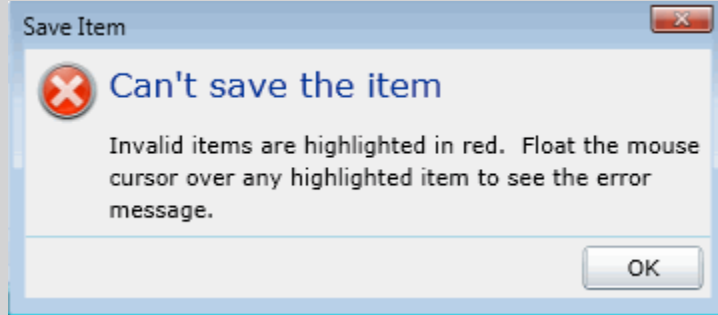
Note: Response Management provides a full-text search tool that uses the information in Name, Shortcut, and Labels along with the response item's content to find a response.

Tip: **Name** identifies the response item, but does not have to be unique. If you do not provide a name, it defaults to the first few characters of the message.

6. In the **Shortcut** text box, type a short name, abbreviation or code for this response.

Tip: Use this Shortcut to insert a response item where needed by typing the shortcut and then pressing Ctrl+Space. The shortcut does not have to be unique. For example, you could use the shortcut "Hi" for all the variations of your standard greeting.
7. In the **Labels** text box, type a space-separated list of words that identify or classify this response item.
8. Click **Save**.

Note: To save a new item, all required information must be entered. Details tabs containing incomplete or erroneous information, are shown with an error message:



Tip: You can edit or delete multiple files or messages by selecting consecutive items with the Shift key and click, or multiple items with the Control key and click.

Related Topics

[Response Management](#)

[Add a Response Management Library](#)

[Add a Response Management File](#)

Import a Response Management Document

You can import response management documents from CIC 3.0 to the current release.

Note: You can import only response management documents that were created with CIC 3.0. Do not use this feature to import XML documents that were created outside of CIC.

1. Under the **Response Management** subcontainer, click the Import Documents subcontainer.
2. To complete the **Response document path** field, click **Browse** to navigate to the document that you want to import.
3. Click **Import**.
4. Optionally click the response management document in the list to preview it.
5. In the **Name** field type a descriptive name that agents will see.
6. Click **Save**.

Related Topics

[Response Management](#)

[Add a New Response Management Library](#)

[Add a Response Management Message](#)

[Add a Response Management File](#)

Interaction Analyzer

Interaction Administrator allows you to define the keywords that Interaction Analyzer uses to monitor conversations between agents and customers. You can assign scores to keywords to indicate their importance, and define thresholds for each keyword to indicate how certain Interaction Analyzer must

be in its identification of a keyword. When a keyword is spoken in a phone conversation associated with a workgroup queue, Interaction Analyzer detects the word or phrase and identifies and marks the location in the recording where the word or phrase was spoken. CIC subsystems use this information to evaluate customer interactions.

Note: For more information regarding Interaction Analyzer, see the *Interaction Analyzer Technical Reference* in the PureConnect Documentation Library.

The **View Keyword Sets** page displays keyword sets in a list in the master view, and displays details of the currently selected keyword set in the details view. You can take actions on the keyword sets in the list view, such as add, delete, and copy and paste, and you can add a new keyword set. You can change the way the list is displayed, such as change visible columns, sort by column, and filter.

Related Topics

[Keyword concepts](#)

[Manage keyword sets](#)

[Manage keywords](#)

Keyword concepts

This section contains the following topics:

[Keyword considerations](#)

[Keyword definitions](#)

[Keyword examples](#)

[Keyword organization](#)

Keyword considerations

This topic describes factors to consider to ensure you are monitoring the most important keywords and phrases for your contact center.

Factors to consider include:

- [Purpose of your contact center](#)
- [Problems and effectiveness](#)
- [Meaningfulness of keywords](#)
- [Keywords from other areas of your business](#)
- [Agent training](#)
- [Customer Feedback](#)
- [Basic keywords](#)

Purpose of your contact center

One factor to consider is the purpose of your contact center. What is it supposed to achieve? Your contact center may be designed for:

- Technical support/Customer support

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- Sales/Lead generation
- Information services
- Complaints
- Collections
- Notifications/Dispatching
- Order taking/Event registrations
- Appointment scheduling
- Surveys/Market research
- Donations/Charities
- Screenings

With all of the possibilities, you must determine the areas on which you want to focus. Do you want to monitor agent interactions to see who is performing well and who is not? Do you want to monitor customer interactions to see what their concerns are or if they are upset? Perhaps, you want to monitor both sides of the interaction to measure many different aspects of your contact center.

Regardless of these considerations, the most important thing you can do is determine those factors upon which you define the success or failure of your contact center.

Problems and effectiveness

In your contact center, there are many factors for you to consider to determine the effectiveness of your contact center and how your business is meeting customer needs. The following list provides insight into what keyword categories you could monitor:

- **Customer satisfaction** – Are your customers happy at the end of a call? Are they going to be repeat customers? What do they think about your company, product, or service?
- **Customer problems** – What negative words are customers using in interactions? What products or services do customers mention? Do customers threaten legal action? What common problems are customers experiencing? What questions do customers most often ask?
- **Customer loss** – Do your customers mention competitors or their products? Are customers canceling accounts or stopping service? Do customers demand refunds? Do customers keep calling back?
- **Agent effectiveness** – Are your agents using positive words? Are the agents using the provided script? Do customers praise the agents who helped them? Do agents use words and phrases that indicate apathy to customer problems? Do customers ask to speak to managers or supervisors?
- **Agent satisfaction** – Are some agents getting too many difficult calls? Are agents using positive words that indicate their satisfaction? Are agents using negative words when becoming frustrated? Do customers thank agents for their help?
- **Agent training** – Are agents using personalized language when addressing customers? Do agents use the same words as their customers? Do agents know what to say to customers? Do agents know the solutions to problems? Are agents retaining customers or losing them?

What keywords are involved in the answers to these factors? What would a customer likely say in these situations? What would an agent say? Do you want to track every indication of someone using words that indicate emotion? The answers vary according to the purpose of your contact center, and in what you deem important.

Meaningfulness of keywords

When thinking of possible keywords and phrases, determine which are often-used keywords and what information the keyword provides to you.

For example, for a technical support contact center, you could track the word "problem". However, doesn't everyone who calls into that contact center have a problem? What other information does it provide? Instead, try to identify keywords that define the nature of the problem. Is there a specific problem that most customers are having? Does this problem affect customer retention or repeat business?

Careful analysis of recorded interactions and listening to live conversations helps you identify what keywords are most often said, which have the most impact to your business, and which of these differentiate normal interactions from interactions with more importance.

Keywords from other areas of your business

To leverage the most out of Interaction Analyzer for your business, consider what words or phrases are important to other departments. For example, are customers asking questions about a certain product? If so, these calls could be valuable sales leads or indicate the success of a marketing campaign.

Other business units can benefit greatly from the keywords you define. Consider asking for input from these other units and ensure valuable customer information is passed on to them. Customer satisfaction and successful sales are great. Business intelligence and customer metrics are even better.

Agent training

How well do you train your agents? Do they read from a script? Are they trained to use certain words and phrases in their interactions? Are the agents able to resolve customer problems or answer their questions? If you answer "yes" to any of these questions, you already have a set of keywords you can monitor. Monitoring the use of these keywords and phrases can indicate the success of your training methods. It also can help determine which agents need refresher training.

Customer Feedback

Determine which keywords and phrases are important to the direction of your business. Are customers asking for the same new features? Do customers complain about the same things? Are agents constantly defending the position of the company or a business practice?

Ensure you define both positive and negative keywords. Monitoring positive customer keywords enables you to track the general happiness of your customers with your contact center. Conversely, monitoring negative customer keywords helps you identify common problems and agent ineffectiveness.

Collecting this information is valuable to your business. It indicates if your business is achieving or failing to meet customer needs. This data can inform you as to where your business must go and what services, products, or solutions it offers.

Basic keywords

When you determine keyword phrases you want to monitor, think about how that phrase can be said in different ways. One of the most important aspects in creating keyword phrases is to define only those words that are always said. The following examples show how some keyword phrases can be dissected to contain only important words. The optional portions of these phrases are displayed within parentheses.

- *(They/The company/My boss) didn't train me (for/to/on)*
- *I completely understand (the situation/your concerns/the problem/the trouble)*
- *(Since/Because) you are a valued (customer/client/partner)*
- *Your satisfaction is (important/very important/our main concern/my goal)*
- *Is there anything else (I can do/I can help you with/causing you problems)*
- *You're not listening (to me/ to a word I say/at all)*

Related Topics

[Keyword organization](#)

[Keyword definitions](#)

[Example keywords](#)

Keyword definitions

This topic provides descriptions of the various methods you can use to create keywords for use in Interaction Analyzer.

- [Keyword entry](#)
- [Keyword user-defined pronunciations](#)
- [keyword anti-spellings](#)

Keyword entry

You enter keywords, up to 120 characters, through the Interaction Analyzer interface of Interaction Administrator or the Interaction Administrator interface of IC Server Manager. When entering a keyword or phrase, you enter it with its normal spelling. The speech recognition engine uses that spelling to match it to its usual phonetic pronunciation.

Keyword spellings

You can add multiple spellings of a keyword, depending on the different ways in which a person pronounces a word, such as data. For this word, some people pronounce it as dayta while others pronounce it as dahta. The dictionary through which Interaction Analyzer compares pronunciations already handles many words with multiple pronunciations. However, if you enter terms that are specific to a specialized field, such as medicine or science, you may need to provide alternate spellings to ensure that Interaction Analyzer can recognize the word.

Keyword synonyms

One method to avoid regarding spellings is that of synonyms. For example, if you wanted a keyword of home, resist the temptation to enter the following synonyms as alternate spellings:

- House
- Abode

- Domicile
- Casa
- Hacienda
- Chateau
- Castle
- Shack
- Hut
- Home
- Condominium
- Apartment
- Dwelling

Genesys recommends that you do not enter synonyms as alternate spellings because Interaction Analyzer determines the spotability factor by the lowest, least discernable spelling. In the previous example, the lowest, least discernable spelling would be "Hut". Instead, create a keyword set titled home and enter each synonym as a keyword. This method ensures each synonym keyword has a separate spotability factor and confidence threshold, and can be further discerned through additional spellings and user-defined pronunciations.

Keyword acronyms

If you want to enter an acronym as a keyword, enter the acronym in capital letters. The following examples are acronyms that you can enter: USA, FBI, ID, ETA, EU, COD, HTTP, FTP, and so on. This method does not work for acronyms that are pronounced as words, such as SCSI (scuzzy), RAM, CD-ROM, PIN, NASA, and SCUBA.

Keyword punctuation

Interaction Analyzer ignores any punctuation characters that you enter in a keyword. These characters include commas, periods, exclamation points, question marks, colons, semicolons, special characters (\$, %, &, (), @), and quotation marks.

Keyword numbers

Any numbers you enter as keywords are recognized as words. For example, if you enter H2O, Interaction Analyzer recognizes this keyword as "H two O". However, if you enter multiple digits, Interaction Analyzer recognizes each number separately. For example, if you enter 100, Interaction Analyzer recognizes this keyword as "one, zero, zero", not "one-hundred". Likewise "21" is identified as "two, one", not "twenty-one".

Keyword contractions

Interaction Analyzer recognizes contractions when you enter them as keywords. Words such as don't, can't, won't, couldn't, it's, and I'll are acceptable.

Keyword abbreviations

Interaction Analyzer does not recognize abbreviations, such as Dr., Mrs., Mr., Jr., Sr., and others.

Keyword user-defined pronunciations

When you define keywords, Interaction Analyzer also allows you to enter phonetic, user-defined spellings based on ARPAbet. ARPAbet was a project that used ASCII characters to define the phonemes that make up all possible sounds in the English (US) language.

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There are many words in English (US) that are spelled differently than the associated pronunciation. For example, tough, cough, dough, through, and bough are all similar in their spellings ("ough"), but have different pronunciations. Using user-defined pronunciations enables Interaction Analyzer to identify these words correctly. For example, the following table displays how these words are specified using ARPAbet phonemes:

Word	ARPAbet pronunciation
tough	t ah f
cough	c ao f
dough	d ow
through	th r uw
bough	b aw

The following table provides the ARPAbet phonemes and example words:

ARPAbet phoneme	Word examples	ARPAbet phoneme	Word examples
Vowels		Consonants	
aa	father, cot	b	buy
ae	at, fast	ch	chair
ah	but, sun	d	day
ao	off, fall, frost	dh	that, the, them
aw	how, now	f	for
ay	my, why, ride	g	go
eh	red, men	hh	house
er	her, bird, hurt, nurse	jh	just
ey	say, eight	k	key
ih	big, win	l	late
iy	bee, she	m	man

ow	show, coat	n	non
oy	boy, toy	ng	sing
uh	should, could	p	pay
uw	you, new, food	r	run
y	yes	s	say
		sh	show
		t	take
		th	thanks, Thursday
		v	very
		w	way
		z	zoo
		zh	measure, pleasure

The following table provides examples of user-defined spellings of words in the English (US) language:

Word	User-defined spelling
Abdominal	ae b d aa m ah n ah l
Acrimonious	ae k r ah m ow n iy ah s
Affluent	ae f l uw ah n t
Articulated	aa r t ih k y ah l ey t ah d

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Belaboring	b ih l ey b er ih ng
Botanists	b aa t ah n ih s t s
Channeling	ch ae n ah l ih ng
Charismatic	k eh r ih z m ae t ih k
Circumstantially	s er k ah m s t ae n ch ah l iy
Deformation	d iy f ao r m ey sh ah n
Domestication	d ah m eh s t ah k ey sh ah n
Eyeglasses	ay g l ae s ah z
Galvanizing	g ae l v ah n ay z ih ng
Hostilities	hh aa s t ih l ah t iy z
Infrastructure	ih n fr ah s tr ah k ch er

Another resource is the ARPAbet topic on Wikipedia at the following URL address:

<http://en.wikipedia.org/wiki/Arpabet>.

User-defined pronunciations are also useful for the different dialects you can encounter in a language. For example, consider the English (US) word "lawyer" (l ao y er). Someone from Massachusetts may pronounce the word as "lahyah" (l aa y ah) while someone from Alabama could pronounce it "lawryer" (l ao r y uh r). User-defined spellings can help you define the keyword so Interaction Analyzer can correctly produce a match.

Interaction Analyzer uses extensions to ARPAbet for languages that need more phonemes to cover the phonology of the language.

Important!

There are words in the medical or scientific fields that are based on Latin and Greek, but have had the associated pronunciations transformed over centuries of use, such as peritonitis. For these words, if Interaction Analyzer has difficulty identifying the keyword based on the correct spelling, Genesys recommends that you enter user-defined pronunciations to ensure proper identification of those unique keywords.

Keyword anti-spellings

After you define keywords, you have the option of entering anti-spellings that specify similar-sounding words you do not want mistaken for that keyword. These are words that could confuse Interaction Analyzer and be marked as instances of that keyword, such as false positives.

For example, the following table provides some keywords and possible anti-spellings you can add to the definitions:

Keyword	Anti-keywords
Lawyer	Lower Loiter Foyer Employer
Surely	Charlie Surly Purely Journey
Guarantee	Warranty Guillotine Green tea
Unfair	Conveyor Unveil Affair A fare On there

Additionally, you can specify anti-spellings where the keyword is part of a larger word. For example, consider the word form. You probably would not want Interaction Analyzer to spot this word when it is a part of larger words, such as uniform, formatted, and formation. In this case, if Interaction Analyzer does spot the keyword within the larger words, you can enter the mistaken words as anti-spellings.

Do not try to determine anti-spellings when you define a keyword. Instead, when your keywords are active and are run against real interactions in the contact center, you can analyze recordings, identify words mistaken as keywords, and add them as anti-spellings to the keyword definition.

If you eventually enter anti-spellings in a keyword definition, you can also consult numerous Web sites that list other rhyming words for that specific keyword.

Related Topics

[Keyword considerations](#)

[Keyword organization](#)

[Keyword examples](#)

Keyword examples

This topic provides example keywords and phrases you might set up for use in Interaction Analyzer to spot usage when spoken by agents, customers, or both. Use these examples to help you think about what keywords and phrases are important to your contact center or business and then build upon it.

Note: These keywords are only examples and do not represent a comprehensive collection of keywords that can achieve the goals for your contact center.

Examples are provided for the following keyword categories:

- [Agent greetings](#)
- [Agent training issues](#)
- [Call conclusion](#)
- [Call escalation](#)
- [Competitors](#)
- [Cursing](#)
- [First Call Resolution \(FCR\)](#)
- [Marketing](#)
- [Negative statements](#)
- [Positive statements](#)
- [Problem identification](#)
- [Problem resolution](#)
- [Sales](#)
- [Service improvement](#)
- [Threats](#)

- [Upset customer](#)

The following tables contain example keywords, sorted by category and keyword set name.

Example Keyword Set Category: Agent greetings

Keyword Set Name	Keywords
(Agent) Collections Statements	<ul style="list-style-type: none"> • This is your final • You are obligated to • Garnish • We will send this account to collections • We are demanding full payment on this account • Forfeiture of discount • Final deadline • Offer expires • Last chance • No choice but to • Shut off • Suspended
(Agent) Opening Statements	<ul style="list-style-type: none"> • Hi my name is • Hello my name is • How are you today • My goal is to
(Agent) Sales Pitch	<ul style="list-style-type: none"> • You will be able to enjoy • You will only be charged • We have a variety of • It's a wonderful service • Won't take much of your time • For special customers like you • What can I do to get you to • All I need is your • Could I have your credit card number • What would convince you • You can't go wrong
(Agent) Survey Pitch	<ul style="list-style-type: none"> • What is the reason for your call today • How do you like • How would you rate • What is the most important

Example Keyword Set Category: Agent training issues

Keyword Set Name	Keywords
------------------	----------

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(Customer) Broken Trust	<ul style="list-style-type: none"> • You said • You told me • Wait a minute • Wait a second • Ask me that before • Asked me that before • You even listening • You listening • You're not listening • Don't know what you're doing • I don't care • Don't give me • You don't understand • Report you • I didn't get my • I did not receive
(Agent) Excuses	<ul style="list-style-type: none"> • I just work here • It's not my job • I'm just doing my job • I'm new here • I just started here • They didn't train me
(Agent) Improper Statements	<ul style="list-style-type: none"> • Calm down • Hold on • Can't do that • Lost your record • Lost your file • File is lost • Shut up
(Agent) Lack of Knowledge	<ul style="list-style-type: none"> • I don't know • Beats me • Let me get back to you later • Let me call you back later • I guess so

Example Keyword Set Category: Call conclusion

Keyword Set Name	Keywords
(Agent) Ending Statements	<ul style="list-style-type: none"> • Have a great day • Again, my name is

Example Keyword Set Category: Call escalation

Keyword Set Name	Keywords
(Customer) Redirection Requests	<ul style="list-style-type: none"> • Your supervisor • A supervisor • Your manager • A manager • Let me speak to • Let me talk to • I want to talk • I want to speak • Transfer me to someone who • I demand

Example Keyword Set Category: Competitors

Keyword Set Name	Keywords
Competitor Names	<ul style="list-style-type: none"> • <i>XYZ Company</i> • <i>111 Corporation</i> • <i>ABC Incorporated</i>
Competitor Products	<ul style="list-style-type: none"> • <i>Product Name 1</i> • <i>Product Name 2</i> • <i>Product Name 3</i>

Example Keyword Set Category: Cursing

Keyword Set Name	Keywords
Cursing	<ul style="list-style-type: none"> • Darn • Heck • Freak • Crap • Sucks • Shove it

Example Keyword Set Category: First Call Resolution (FCR)

Keyword Set Name	Keywords
(Customer) Subsequent Call	<ul style="list-style-type: none"> • Last time • Called before • Calling again • Calling back • Called back • Keep calling

	<ul style="list-style-type: none"> • Time I've called
--	--

Example Keyword Set Category: Marketing

Keyword Set Name	Keywords
(Agent) Ad Placement	<ul style="list-style-type: none"> • How did you hear about • What referred you to our • How you heard about • Did you see our
(Customer) Ad Placement	<ul style="list-style-type: none"> • I saw your • I heard your • I read your • On your Web site

Example Keyword Set Category: Negative statements

Keyword Set Name	Keywords
(Agent) Astonishment	<ul style="list-style-type: none"> • You're kidding me • Got to be kidding • That's unbelievable • You're putting me on • No way
(Agent) Condescension	<ul style="list-style-type: none"> • You're not the only one • How I feel • That's too bad • Aren't you just • Why are you so
(Agent) Poor Attitude	<ul style="list-style-type: none"> • I don't care • I don't believe you • Sucks to be you • I'd hate to be you • Tell someone who cares • I can't handle this • Out of luck • You should call back • That isn't my responsibility • Will tell you the same thing
(Customer) Collection Excuses	<ul style="list-style-type: none"> • Unemployed • Bankruptcy • I don't have a job

	<ul style="list-style-type: none"> • Lost my job • Was fired • Laid off
--	--

Example Keyword Set Category: Positive statements

Keyword Set Name	Keywords
(Agent) Action	<ul style="list-style-type: none"> • Right away • I will make sure • I am going to • What we can do • I will address this • The best thing I can do • What I will do for you
(Agent) Adverbs	<ul style="list-style-type: none"> • Definitely • Absolutely • Surely • Certainly • Quickly • Positively
(Agent) Advice	<ul style="list-style-type: none"> • I would suggest • I recommend • Your best option is • As soon as you receive • To avoid this problem • All you need to do is • The best thing you can do
(Agent) Cooperation	<ul style="list-style-type: none"> • Let's work on this together • We can resolve this • Let's figure out what • Let's look at this together • Let's go ahead and • Let's take care • We can fix this
(Agent) Empathy	<ul style="list-style-type: none"> • I see • I understand • Understand the inconvenience • I completely understand • How can I help you • I'm sorry to hear that

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	<ul style="list-style-type: none"> • Sorry for the inconvenience • You are a valued
(Agent) General	<ul style="list-style-type: none"> • Please • Thank you • I appreciate your patience
(Agent) Reassurance	<ul style="list-style-type: none"> • Rest assured • I will try my best • More than glad • More than happy • Based on our experience • I will ensure that • I assure you that • Your satisfaction is • We value • Of course • Guarantee
(Customer) Trust	<ul style="list-style-type: none"> • Trust you • I can believe that • Straightforward • Honest with me • Honest with you

Example Keyword Set Category: Problem identification

Keyword Set Name	Keywords
(Customer) Account Identification	<ul style="list-style-type: none"> • My account number is • My number is • My user name is • My customer ID is • My account is
Product Identification	<ul style="list-style-type: none"> • <i>Product name 1</i> • <i>Product name 2</i> • <i>Product name 3</i>

Example Keyword Set Category: Problem resolution

Keyword Set Name	Keywords
(Agent) Resolution Indicators	<ul style="list-style-type: none"> • Is there anything else I can help you with • I'm glad I could help
(Customer) Resolution Indicators	<ul style="list-style-type: none"> • I'm happy

	<ul style="list-style-type: none"> • I'm pleased • Great • Amazing • Amazed • Excellent • Fantastic • Perfect • Working now • It works • Wonderful • Relieved • Terrific • Fabulous • Satisfied • Outstanding • That was easy • Very helpful • I appreciate • Thank you • Thanks • Thankful • That's better • That's much better • You deserve a • You really know • Great job • Good work • Job well done
--	--

Example Keyword Set Category: Sales

Keyword Set Name	Keywords
(Customer) Loss of Business	<ul style="list-style-type: none"> • Cancel my account • Canceling my account • Close my account • Cancel my service • Stop service • Money back • Refund • I'll never purchase • I'll never buy

IC Server Manager Administrator Printable Help

	<ul style="list-style-type: none"> • Never get another • Hears about this • Better Business Bureau
(Customer) Referral	<ul style="list-style-type: none"> • I'll tell everyone • I'll tell my • Will love this • For my friends
(Customer) Repeat Business	<ul style="list-style-type: none"> • Where can I get • When can I get • When does • I'm going to order • I'll order • Get another • Next version • Next release • Next update
(Customer) Sale Success	<ul style="list-style-type: none"> • When will I receive • What can I expect • My credit card number is • I'll go with • Purchase • I'll buy

Example Keyword Set Category: Service improvement

Keyword Set Name	Keywords
(Customer) Suggestions	<ul style="list-style-type: none"> • It would be great if • What you should do is • Would be better if • Would be so much better if • Want to see • Want to hear about • Like to see • You should consider • You should make

Example Keyword Set Category: Threats

Keyword Set Name	Keywords
Legal Action	<ul style="list-style-type: none"> • Attorney • Lawyer

	<ul style="list-style-type: none"> • Legal action • I'll sue you • I'll sue your • Take you to court • Lawsuit
Threats	<ul style="list-style-type: none"> • Come down there • I'll find you • Kill you • Don't make me • I'll get you • Get even • Blow up • Revenge • Pay back • Hurt you • Where it hurts • Blow you away • Gun down • Shoot you • Stab you

Example Keyword Set Category: Upset customer

Keyword Set Name	Keywords
(Customer) Emotional Words	<ul style="list-style-type: none"> • Unacceptable • Frustrated • Unfair • Isn't fair • You people • Angry • Makes me mad • Makes me so mad • Outraged • I don't understand • Ridiculous • Upset • Ticked off • Is that the best • Unhappy
(Customer) Time Issues	<ul style="list-style-type: none"> • I can't wait

	<ul style="list-style-type: none"> • I don't have time • Take all day • Hours and hours • Put me on hold • Can you hurry • Waste my time • Wasting my time • Taking so long • Do you know what time it is
--	--

Related Topics

[Keyword considerations](#)

[Keyword definitions](#)

[Keyword organization](#)

Keyword organization

This topic contains the purpose of categories, keyword set names, and keywords. The following table displays a brief example of how you can use categories and keyword set names to organize your keyword definitions:

Category	Keyword set name	Keywords
Marketing	(Agent) Ad placement	<ul style="list-style-type: none"> • Where did you see our ad • Where you saw our ad • How did you hear about us
	(Customer) Ad placement	<ul style="list-style-type: none"> • I saw your ad • I saw your commercial • I read your ad • I heard your commercial
Sales	(Agent) Sale success	<ul style="list-style-type: none"> • Could I have your credit card number • I'm very glad that you've decided to
	(Customer) Sale success	<ul style="list-style-type: none"> • You've talked me into it • I would like to purchase • I would like to buy
Agent Greetings	(Agent) Initial greeting	<ul style="list-style-type: none"> • Hi, my name is • Hello, my name is • Thank you for calling
	(Agent) Reason for call	<ul style="list-style-type: none"> • How can I help you • What can I do for you • What is the nature of your call

Keyword categories

Optionally, you can create categories to group your keyword sets. You can use categories to define the purpose of the keyword sets that it contains. By design, categories are a general description of your organization of keyword sets, and their included keywords. Create your structure from general to specific to make it easier to search for and locate keywords.

Note: Category names can be up to 128 characters long.

CIC uses the categories you create for sorting your keyword sets in the administrative interface and for tagging recordings. These recording tags are visible when you view recordings, which enable you to search for and find keywords quickly.

Keyword set names

When you create keywords, you enter those keywords under a keyword set. You can define 128 keywords and phrases under one keyword set. Keyword sets must be unique and long enough to accurately describe the keywords it contains.

Generally, you want to create keyword sets to identify the keywords included in them. If you want to monitor for keywords that an agent might say when receiving a call, you could provide a keyword set of "Agent greeting – Name" or "Agent – initial greeting".

Your keyword set name must not be identical to your category name. Doing so removes the organizational benefits. Ideally, you want two or more keyword sets within each category, which helps you find the area containing the keywords you want to modify or the place to enter new ones.

Related Topics

[Keyword considerations](#)

[Keyword definitions](#)

[Keyword examples](#)

Manage keyword sets

Manage keyword sets

This section contains the following topics:

[View keyword sets](#)

[Add a keyword set](#)

[Copy a keyword set](#)

[Delete a keyword set](#)

[Search for a keyword set](#)

[Modify a keyword set](#)

[Add keyword set notes](#)

[Manage custom attributes](#)

View keyword sets

The **View Keyword Sets** page displays keyword sets in a list in the master view, and displays details of the currently selected keyword set in the details view. You can take actions on the keyword sets in the list view, such as add, delete, and copy and paste, and you can add a new keyword set. You can change the way the list is displayed, such as change visible columns, sort by column, and filter.

To view keyword sets:

1. Under Interaction Analyzer, click **Keyword Sets** or click **Interaction Analyzer** in the breadcrumbs if available.
2. The **View Keyword Sets** page appears.

Related Topics

[Add a keyword set](#)


[Search for a keyword set](#)

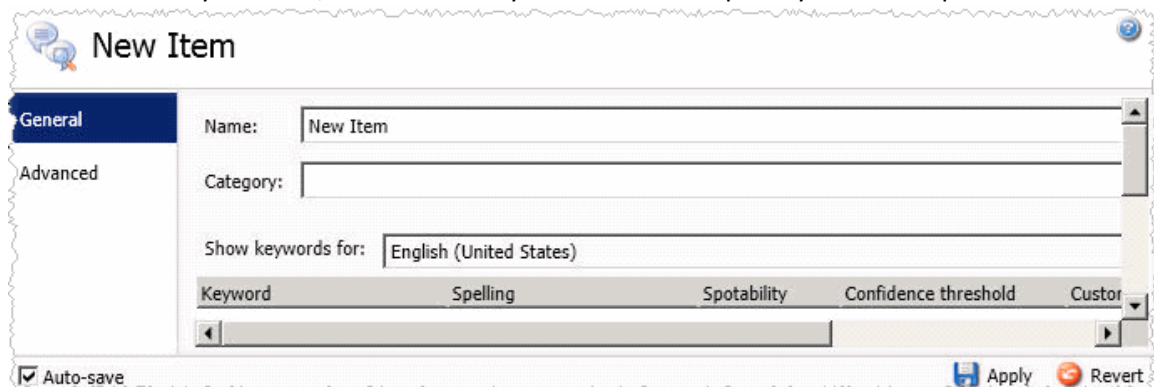
Add a keyword set

Important!

It is strongly recommended to define keywords, keyword set names, and categories before attempting to enter keywords. This can save a great deal of time, as opposed to entering keywords without having a defined structure.


To add a keyword set:

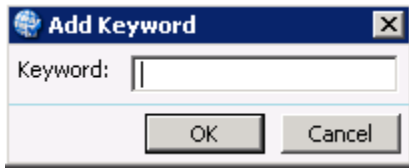
1. In the upper-right pane of Keyword Sets, click . A **New Item** is created in the lower pane. This new item is a keyword set, which enables you to enter multiple keywords and phrases.




2. In the **Name** box, type the name to assign to this keyword set.

The keyword set name must be unique from other keyword set names and be descriptive enough to enable you to identify the types of keywords it contains. This name is only for your use in locating keywords through this administrative interface. Other CIC products associated to Interaction Analyzer do not use the keyword set name.

3. In the **Category** box, type the name of the category to assign to this keyword set. See Keyword categories for more information about categories, their purpose, and how they are used.
4. On the right side of the lower pane, click . The **Add Keyword** dialog box appears.



5. In the **Keyword** box, type a keyword or phrase you want Interaction Analyzer to monitor and then click **OK**. The keyword is added to the current keyword set.
6. In the lower-right corner of the lower pane, click  to apply your changes.

Tip: You can undo your changes by clicking  in the lower right corner of the lower pane.

Related Topics

[Keyword considerations](#)




[Keyword definitions](#)

[Keyword organization](#)

[Modifying a keyword set](#)

Copy a keyword set

To copy a keyword set:

1. Under Interaction Analyzer, click **Keyword Sets** or click **Interaction Analyzer** in the breadcrumbs if available.
2. In the upper pane, click the **Keyword Set** you want to copy and then click . The selected keyword set is copied to the Clipboard.
2. In the upper pane, click . A **New item** is created in the lower pane that contains the information from the copied keyword set.
3. Type a new name for the keyword set in the **Name** box, make any other desired changes, and click  to apply your changes.

Tip: You can undo your changes by clicking  in the lower right corner of the lower pane.

Related Topics

[Manage keyword sets](#)

[View keyword sets](#)


[Add a keyword set](#)

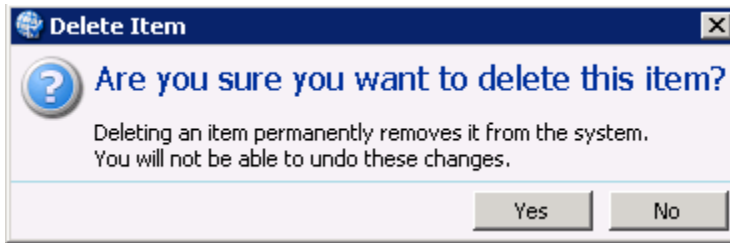
[Delete a keyword set](#)

Delete a keyword set

To delete a keyword set:

1. Under Interaction Analyzer, click **Keyword Sets** or click **Interaction Analyzer** in the breadcrumbs if available.

2. In the upper pane, click the **Keyword Set** you want to delete and then click . The Delete Item dialog box appears.



3. Click **Yes**. The selected keyword set is deleted.

Tip: You can undo your changes by clicking  in the lower right corner of the lower pane.

Related Topics

[Manage keyword sets](#)

[View keyword sets](#)

[Add a keyword set](#)

[Copy a keyword set](#)


Search for a keyword set

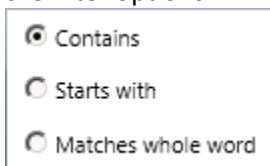
This topic contains the steps for searching for a keyword set by name or category.

The filter options for searching for a keyword set are:

- **Contains** – Searches for keyword set names that contain the characters you specify in the **Name** box.
- **Starts with** – Searches for keyword set names that start with the characters you specify in the **Name** box.
- **Matches whole word** – Searches for keyword set names that match the entire word you specify in the **Name** box.


To search for a keyword set by name:

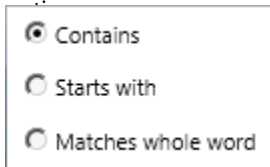
1. In the upper-right pane of Keyword Sets, click  to the right of the **Name** box and select one of the filter options.



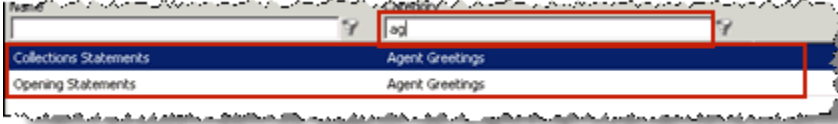
2. Type the keyword set name to search for in the **Name** box. As you are typing characters, keyword set names that match what you are typing appear below the **Name** box.
3. Click the desired **Keyword Set** to display its information in the lower pane.

To search for a keyword set by category:

1. In the upper-right pane of Keyword Sets, click  to the right of the **Category** box and select one of the



2. Type the category to search for in the **Category** box. As you are typing characters, categories that match what you are typing appear below the **Category** box.



3. Click the desired **Keyword Set** to display its information in the lower pane.

Related Topics

[Keyword definitions](#)

[Keyword organization](#)

Modify a keyword set

This topic contains the steps for modifying keyword sets, keyword categories, and keywords. It also contains steps for deleting a keyword from a keyword set.

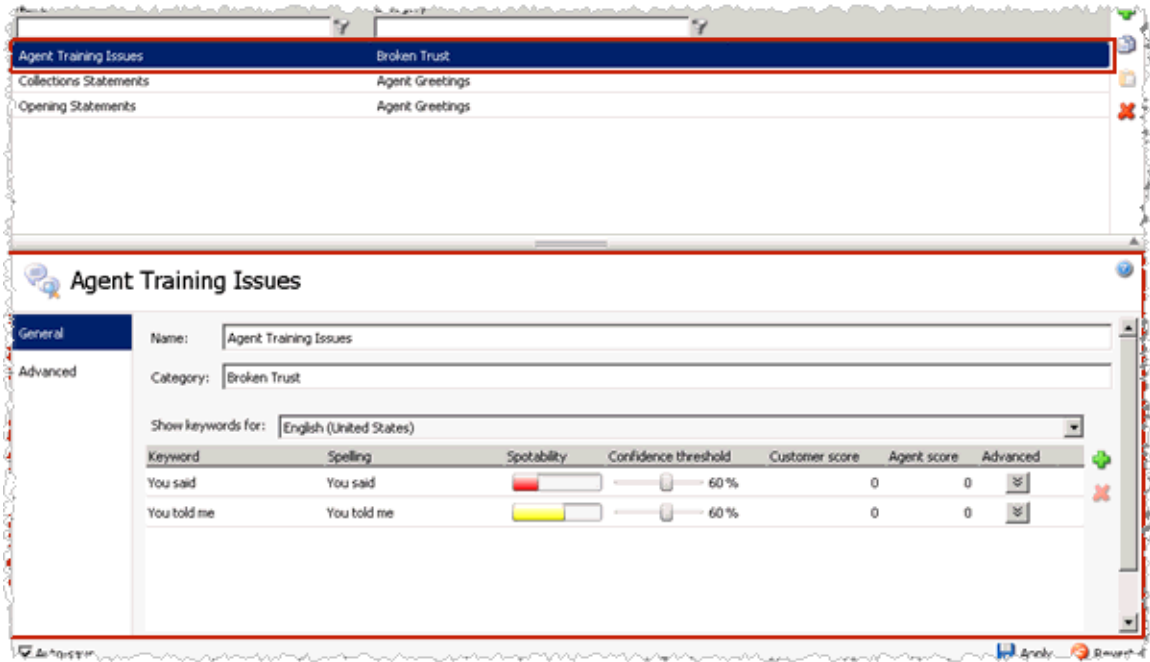
Important!

It is strongly recommended to define keywords, keyword set names, and categories before attempting to enter keywords. This can save a great deal of time, as opposed to entering keywords without having a defined structure.

To modify a keyword set:


1. Under Interaction Analyzer, click **Keyword Sets** or click **Interaction Analyzer** in the breadcrumbs if available.

2. Click the **Keyword Set** to modify. The keyword set appears in the lower pane.




2. To modify the keyword set name, in the **Name** box, type the name to assign to this keyword set.

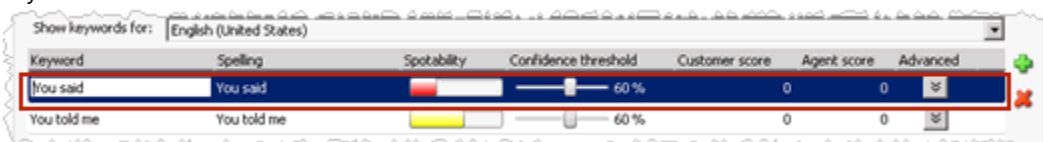
The keyword set name must be unique from other keyword set names and be descriptive enough to enable you to identify the types of keywords it contains. This name is only for your use in locating keywords through this administrative interface. Other IC products associated to Interaction Analyzer do not use the keyword set name.

3. To modify the category, in the **Category** box, type the category name to assign to this keyword set. See *Keyword organization* for more information about categories, their purpose, and how they are used.
4. To modify a keyword in this keyword set, click the **Keyword** to modify and make your changes. For more information, see *Setting the Confidence Threshold for a Keyword* and *Set the Score for a Keyword*.
5. In the lower-right corner of the lower pane, click  to apply your changes.

Tip: You can undo your changes by clicking  in the lower right corner of the lower pane.

To delete a keyword from a keyword set:

1. In the upper pane, click the **Keyword Set** that contains the keyword to delete. The selected keyword set appears in the lower pane.
2. In the lower pane, click the **Keyword** to delete and then click . The selected keyword is removed from the keyword set.



Tip: You can undo your changes by clicking  in the lower right corner of the lower pane.

Related Topics

[Add a keyword set](#)

[Keyword considerations](#)

[Keyword definitions](#)


[Keyword organization](#)

[Set the score for a keyword](#)

Add keyword set notes

This topic contains the steps for adding notes about changes you make to the keyword set.

To add keyword set notes:

1. In the upper-right pane of Keyword Sets, click the **Keyword Set** for which to add a note. The keyword set appears in the lower pane.
2. In the lower pane, click **Advanced** in the left navigation box. The Custom Attributes and History bars appear.
3. Click **History**. The **Notes** box appears.
4. Click in the **Notes** box and type information regarding changes you made to the keyword set.
5. In the lower-right corner of the lower pane, click  to apply your changes. The last modified and created dates are automatically updated.

Tip: You can undo your changes by clicking  in the lower right corner of the lower pane.

Related Topics

[Manage custom attributes](#)

[Modify a keyword set](#)


Manage custom attributes


This topic contains the steps for adding, modifying, and deleting a custom attribute for a keyword set.

To access custom attributes:

1. In the upper-right pane of Keyword Sets, click the **Keyword Set** for which to add, modify, or delete a custom attribute. The keyword set appears in the lower pane.
2. In the lower pane, click **Advanced** in the left navigation box. The **Custom Attributes** and **History** bars appear.
3. Click **Custom Attributes**. The Custom Attributes appear.


To add a custom attribute:

1. Click  to the right of the Custom Attributes box. The **Name** and **Value** boxes are available for entry.

2. Click in the **Name** box and type a unique name for the custom attribute.
3. Click in the **Value** box and type a value for the custom attribute.
4. In the lower-right corner of the lower pane, click  to apply your changes.


Tip: You can undo your changes by clicking  in the lower right corner of the lower pane..

To modify a custom attribute:

1. Click in the **Name** box of the custom attribute to modify and type a unique name for the custom attribute.
2. Click in the **Value** box of the custom attribute to modify and type a value for the custom attribute.
3. In the lower-right corner of the lower pane, click  to apply your changes.

Tip: You can undo your changes by clicking  in the lower right corner of the lower pane..

To delete a custom attribute:

- Click the **Custom Attribute** you want to delete and then click . The selected custom attribute is deleted.

Tip: You can undo your changes by clicking  in the lower right corner of the lower pane..

Related Topics

[Add keyword set notes](#)

[Modify a keyword set](#)

Manage keywords

This section contains the following topics:

[Modify advanced keyword definition settings](#)

[Set the confidence threshold for a keyword](#)

[Set the score for a keyword](#)


Modify advanced keyword definition settings

Once you define a keyword, you can add additional settings for that keyword, such as more accurate spellings and anti-spellings of the keyword. This topic contains the steps for setting these advanced features.



Important!

Do not attempt to use these advanced features unless Interaction Analyzer is having difficulty identifying the keyword or is mistaking other words for the keyword. Keyword definition additions that need to be made, can only be determined through careful analysis.

To modify the advanced settings for a keyword definition:

1. In the upper-right pane of Keyword Sets, click the **Keyword Set** that contains the keyword for which to modify advanced settings. The keyword set appears in the lower pane.
2. In the lower pane, click  for the keyword for which to modify advanced settings. The advanced settings appear beneath the keyword definition.
3. In the **Configuration category** list box, select the advanced feature to modify:
 1.
 - **Spellings** – This feature allows you to enter an alternative spelling for the defined keyword. For example, if the keyword is "read the fine print", you could enter a new spelling of "reed the fine print" to ensure Interaction Analyzer does not identify the alternative pronunciation of "red the fine print".
 - **User-Defined Pronunciations** – This feature allows you to enter the phonetic spelling of the keyword as defined through the ARPAbet phonemes. For example, "Hi my name is" would be entered as "hh ay m ay n ey m ih s". Enter a user-defined pronunciation only for keywords that are not recognized by Interaction Analyzer. See Interaction Analyzer keyword user-defined pronunciations for more information on the ARPAbet phonemes.
 - **Anti-Spellings** – This feature allows you to enter spellings that Interaction Analyzer must not mistake for the keyword. For example, if the keyword is "lawyer", you can enter "employer" as an anti-spelling if Interaction Analyzer is mistaking that word for the keyword.
 - **User-Defined Anti-Pronunciations** – This feature allows you to enter ARPAbet phonemes as a series of sounds that Interaction Analyzer must not mistake for the keyword. For example, if the keyword is "lawyer" and an anti-spelling of "employer" has not corrected the misinterpretation of the keyword, you would enter "eh m p l oy er". See Interaction Analyzer keyword user-defined pronunciations for more information on the ARPAbet phonemes.

Note: For more information about the Arpabet dictionary, see the *Interaction Analyzer Technical Reference* document in the PureConnect Documentation Library.

4. To add an entry for the selected advanced feature, click  to the right of the **Configuration category** list box. A dialog box appears.
5. In the **Value** box, type the text to add as an entry for the selected **Configuration category** and click **OK**. The entry is added to the selected **Confidence category**.
6. In the lower-right corner of the lower pane, click  to apply your changes.

Tip: You can undo your changes by clicking  in the lower right corner of the lower pane.

Related Topics

[Keyword definitions](#)

[Keyword organization](#)

Set the confidence threshold for a keyword

This topic contains the steps for setting the confidence threshold for a keyword. The confidence threshold feature allows you to specify how much certainty Interaction Analyzer uses in reporting an


instance of the defined keyword. See Interaction Analyzer confidence threshold for more information about this feature.

Important!

The confidence threshold does not affect the spotability factor of a keyword. The feature only informs Interaction Analyzer how certain it must be to report an identification during real-time analysis of the interaction.

Confidence thresholds use a percentage value to determine the amount of scrutiny that Interaction Analyzer uses. A high percentage value indicates that Interaction Analyzer reports the associated keyword if it matches perfectly. A low percentage value indicates that Interaction Analyzer reports the associated keyword if it loosely matches that keyword. The default percentage value for any newly defined keyword is 50%.

To alter the confidence threshold for a defined keyword:

1. In the upper-right pane of Keyword Sets, click the **Keyword Set** that contains the keyword for which to set the confidence threshold. The keyword set appears in the lower pane.
2. In the lower pane, click and hold the left mouse button on the slider control for the keyword for which to set the confidence threshold.
3. Move the slider control to the right to increase the confidence threshold or to the left to decrease the confidence threshold.
4. In the lower-right corner of the lower pane, click  to apply your changes.

Tip: You can undo your changes by clicking  in the lower right corner of the lower pane.

Related Topics

[Keyword considerations](#)

[Keyword definitions](#)

[Keyword organization](#)

Set the score for a keyword

This topic contains the steps for setting the score of a keyword or phrase. It is through scoring that Interaction Supervisor displays score statistics, including the largest positive and negative scores and the cumulative score in the real-time workgroup queue view.

Scoring allows you to assign a degree of importance to the keywords and phrases you defined. For example, you want to assign a low score to keywords and phrases that indicate a customer is becoming upset. Conversely, you want to assign a high score to words and phrases that indicate a customer is responding in a positive manner. You can assign point values to keywords and phrases for both agents and customers.


You can assign to a keyword or phrase any point value from +/-1 to +/-100. Scoring is used to determine which calls need the most attention from the contact center supervisor, who monitors the workgroup queue using a few simple metrics.

Note: The maximum cumulative score an Interaction can have is -99999 to 99999. Assigned point values should be within a reasonable range so the cumulative score for the entire Interaction does not exceed the maximum value.

To set scores for a keyword:

1. In the upper-right pane of Keyword Sets, click the **Keyword Set** that contains the keyword for which to set a score. The keyword set appears in the lower pane.
2. In the lower pane, click the **Customer score** or **Agent score** for the keyword for which to set a score. The keyword entry is highlighted and the scoring field is available to edit.

Tip: If you assign the keyword set to one channel, it is not necessary for you to set a score for both channels.

3. Assign the score by typing a number in the box or using the up and down arrows to increase or decrease the value.
4. In the lower-right corner of the lower pane, click  to apply your changes.

Tip: You can undo your changes by clicking  in the lower right corner of the lower pane.

Related Topics

[Keyword Considerations](#)

[Keyword Definitions](#)

[Keyword Organization](#)

Problem Reporter

Problem Reporter enables an authorized user to report a problem with a CIC client to the user's support representative. When a user selects the **Report a Problem** option from the Help menu in a CIC client, Problem Reporter automatically creates an email message and addresses it to the user's designated representative. The Problem Reporter also uploads a copy of the user's CIC client logs and, optionally a screen capture of the user's desktop, to the IC server. Specify the upload location with the **ProblemReporterPath** server parameter.

To specify a problem report email message recipient, type a valid email address. Separate multiple addresses with a comma, space, or semi-colon.

Note: Problem Reporter is enabled for users that have the [Problem Reporter](#) security right.

Layouts

You can add layouts to identify station locations on floor plan images. This can be helpful in call centers, and is used in applications such as Interaction Supervisor iPad Edition.

To view layouts:

1. Click the **View Layouts** action under the **System Configuration** category.
...or Click **View Layouts** in the breadcrumbs if available.
2. The **View Layouts** page is displayed.
3. The details of the selected layout are displayed in the details view.

Related Topics

[Add a Layout](#)

[Layouts: Positions](#)

[Layouts: Advanced](#)

[Layouts: Positions Field Descriptions](#)

[Layouts: Advanced Field Descriptions](#)

Add a Layout

You can add a new layout in Interaction Administrator Web Edition. The layout settings are configured in detail tabs. In the details view, you can click the section expanders to display or hide the sections' contents.

To add a layout:

1. Right-click in the master view area and select **New**, or click the **New** button in the master view toolbar:

The **New Item** appears in the details view.

2. Complete the following configuration in the first section:
 - Type a unique **Name** for the layout.
 - Optionally select a **Location** from the drop-down list. If you do not set the location, the default location as configured in Regionalization is used.
 - Optionally type a word or phrase that describes this layout.
 - Use the up and down arrows to set the pixel width of the layout image. The default is 10 pixels, and the acceptable range is 10 to 2048.
 - Use the up and down arrows to set the pixel height of the layout image. The default is 10 pixels, and the acceptable range is 10 to 2048.
3. Complete the layout configuration in the [Positions](#) and [Advanced](#) details tabs. The links below open the topics containing procedures for completing each details tabs configuration:
 - [Positions](#)
 - [Advanced](#)

Related Topics

[Layouts: Positions](#)

[Layouts: Advanced](#)

[Layouts: Positions Field Descriptions](#)

[Layouts: Advanced Field Descriptions](#)

Layouts: Positions

The Positions details tab allows you to upload an image to use for the layout display. You can then add positions to represent stations on the layout. Click the name of the details tab for field descriptions.

Note: The image for a layout is automatically removed when it is no longer referenced.

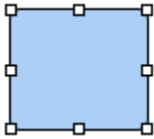
To add an image for the layout:

1. Click the **Positions** detail tab to display the details view.
2. Click the **Browse** button to choose an image to upload.
3. Type a unique **Name** for layout image.
4. Save the new image or modified image.

If necessary, the new image or changes made to an existing image can be reverted.

To add a position on an image:

1. Right-click the image to display the menu:
2. Add a position to the layout. A resizable and moveable box appears.



3. Type a unique name for the position.
4. Set the position's location on the image, and the size.

Note: Positions must not overlap. Any overlapping areas are highlighted in red.

5. Select a CIC station from the drop-down list to associate to the position.
6. You can also do any of the following:
 - Delete an existing position.
 - Select a position and **Align**. You can select multiple positions using Ctrl-click, and **Align** in more positions on the image.
 - Select multiple positions using Ctrl-click, and **Size**.
7. Save the new position(s) or modified position.

If necessary, the new code or changes made to an existing position can be reverted.

Related Topics

[Add a Layout](#)

[Layouts: Advanced](#)

[Layouts: Positions Field Descriptions](#)

[Layouts: Advanced Field Descriptions](#)

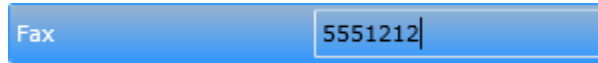
Layouts: Advanced

The Advanced details tab contains the custom attributes and history of the layout. Click the name of the details tab for field descriptions.

To complete the layout's advanced information:

IC Server Manager Administrator Printable Help

1. Click the **Advanced** details tab to display the details view.
2. Click Custom Attributes section expander to display the custom attributes section's contents, and complete the following information:
 - To create a custom attribute, click **+** and type an attribute name. You must also enter a value for the new attribute.

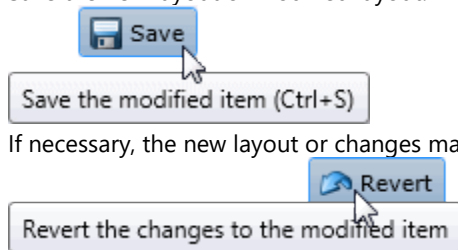


A screenshot of a form with two input fields. The first field is labeled 'Fax' and the second field contains the text '5551212'.

3. Click History section expander to display (or hide) the history section's contents, and complete the following information:

- View the **Created** and **Modified** dates for this layout.
- Type or view information in the **Notes** field for the layout.

4. Save the new layout or modified layout.



If necessary, the new layout or changes made to an existing layout can be reverted.

Related Topics

[Add a Layout](#)

[Layouts: Positions](#)

[Layouts: Positions Field Descriptions](#)

[Layouts: Advanced Field Descriptions](#)

Layouts: Positions Field Descriptions

This topic contains the descriptions for each field in the **Positions** details view under the **View Layouts** page.

Layout Image section

The following fields are related to the image you are associating with the layout.

Browse

This button opens the **Open** dialog box where you select an image. Supported image types include .jpg, .jpeg, and .png.

Image Display Name

By default, the file name of the image you select for the layout is displayed here. If necessary, rename the image. All image names must be unique across all layouts.

Image to Upload

This is the actual file name that you have uploaded. It is view-only.

Image Dimensions

This is the size in pixels of the image you uploaded.

New Image...

Click this button to upload a new image from the layout.

Clear Image...

Click this button to remove the image from the layout.

Selected Position section

The following fields are related to the positions you associate with stations and place on the layout image.

Name

Type a name for this position on the layout. The name must be unique across all positions in this layout. You might use a person's name associated with the station, like PattyJ for a station named PattyJ_SIP_Station.

Left

Use the up and down arrows to set the left alignment of the selected position.

Width

Use the up and down arrows to set the width of the selected position.

Top

Use the up and down arrows to set the top alignment of the selected position.

Height

Use the up and down arrows to set the height of the selected position.

Station

Select the station from the pull-down list that you want to associate with this position. You can not add a new station here. The station must be an existing station already configured, and it must be unique across positions.

Related Topics

[Add a Layout](#)

[Layouts: Positions](#)

[Layouts: Advanced](#)

[Layouts: Advanced Field Descriptions](#)

Layouts: Advanced Field Descriptions

This topic contains the descriptions for each field in the **Advanced** details view under the **View Layouts** page.

Custom Attributes

Use customized attributes to reference other variables and settings through the IceLib interface. When adding a new attribute, use a unique name, otherwise an existing attribute with the same name will be overwritten. Click **Edit** to change the value of an existing custom attribute, or **Delete** to delete an existing custom attribute.

History

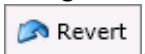
History provides a way to manually document configuration changes and when they occurred. Changes made in Interaction Administrator are also automatically logged in the Interaction Administrator Change Notification Log (Log ID 7). Later, authorized users can run reports against this log to summarize all configuration changes.

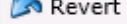
Created

This date is automatically set when the user creates the initial configuration for this layout. If the layout was initially created during setup, the date could be blank.

Modified

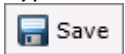
This date is automatically updated each time the user clicks the **OK** button, presumably after making changes to the layout configuration. To avoid updating this date, exit the property sheet by clicking



Note: If you click , none of the changes made to this layout since the changes were last saved are preserved.

Notes

Type notes about configuration settings and changes. If you change the configuration and click



, the **Last Modified** date is updated.

You must manually enter the date beside each entry in the **Notes** field to identify the date of each note.

Related Topics

[Add a Layout](#)

[Layouts: Positions](#)

[Layouts: Advanced](#)

[Layouts: Positions Field Descriptions](#)

Report Management

Use Report Management to create custom parameters and related report metadata. The reports configured in Report Management are run in Interaction Reporter in IC Business Manager. The Report Configuration page allows you to edit and manage metadata related to a report.

Report Configuration page

The Report Configuration page has two views, The Master View and Details View.

Master View

The master view displays a list of report **Categories** and the **Reports** associated with them.

You can take actions on the master view. The actions include: Adding, Editing, Copying, Deleting, and Ordering Categories and Reports in the lists.

Details View

The details view displays specific information about the item selected in the master view, grouped by tabs.

Report Management groups the metadata information in the details view in the following tabs:

- [General](#)
- [Parameters](#)
- [Flexible Columns](#)
- [Sections](#)
- [Custom Data](#)
- [Advanced](#)

General Tab

The General details tab contains basic information for the selected report. The detailed information for the fields on this tab is described in the following table.

General Tab	
Field	Description
Name	Name of the report
SubTitle	Subtitle of the report
Description	Description of the report
Friendly Key	A unique value that easily identifies the instance in the database
Assembly Name	The assembly within which the report exists
Class Name	The class name that identifies the report with the assembly
Orientation	Identifies if the report is printed in landscape or portrait

IC Data Source	The IC_DataSource of the report
Last Run User	Displays the last user to run the report
Last Run Date	Displays the date and time for when the report was last run
Run Count	The total number of times the report has been run

Parameters Tab

The Parameters details tab contains metadata information for report parameters. The parameter list displays parameters for the selected report in the master view. The parameter information is defined in sub-tabs by: General, Data, Custom Data, Miscellaneous, SQL Table Columns, and the sub-tab fields are defined in the following table. You can take actions on the Parameters tab. The actions include: Adding, Editing, Deleting, and Ordering Parameters in the list.

Parameters Tab		
Sub-tab	Field	Description
General	Name	Name of the parameter
	Description	Description of the parameter
	Friendly Key	A unique value that easily identifies the instance in the database
	Assembly Name	The assembly that houses the parameter
	Class Name	The class name of the parameter within the defined assembly
	Required	Check box to select if the parameter is required to run the report
Data	Source	The source of the parameter, user supplied or fixed
	Data Type	The type of data the parameter is expecting, for example, number, date, or string
	Default Value	Default value for the parameter
	Convert Date to GMT	Check box to select if the datetime value of the parameter should be converted to GMT
Custom Data	Custom Data 1	A bucket field that can be used for any purpose when building your own parameters
	Custom Data 2	A bucket field that can be used for any purpose when building your own parameters

	Custom Data 3	A bucket field that can be used for any purpose when building your own parameters
Miscellaneous	Allow Sample	A check box to indicate if the parameter allows for a search of distinct values from the reports stored procedure that uses the stored procedure sample
	Allow Or	A check box to indicate if the parameter supports OR logic
	Allow And	A check box to indicate if the parameter supports AND logic
	Parameter Type	Drop-down box to select parameter type, Filter, Informational, or Threshold
	Visible	A check box to select if the parameter is visible within IC Business Manager
	User Control Assembly Name	The assembly that houses the parameter
	User Control Class Name	The class name of the parameter within the defined assembly
SQL Table Columns	Column Name	The column name the parameter references in the report's stored procedure
	Column Name2	An additional column name to use if the parameter references two columns in the stored procedure

Note: You can configure secure report parameters to limit which data users can report on. For more information, see Restrict the visibility of data in reports.

Flexible Columns Tab

The Flexible Columns details tab contains metadata information for the selected report. The detailed information for the fields on this tab is described in the following table. You can take actions on the Flexible Columns tab. The actions include: Adding, Editing, and Deleting Flexible Columns in the list.

Flexible Columns Tab	
Field	Description
Name	Name of the flexible column as used by metadata
Description	Description of the flexible column
Flexible Column Name	Name of the flexible column as shown on the report

Sections Tab

The Sections details tab contains metadata information for the selected report. The detailed information for the fields on this tab is described in the following table. You can take actions on the Sections tab. The actions include: Adding, Editing, and Deleting Sections in the list.

Sections Tab	
Field	Description
Name	Name of the report section
Section Visible	Check box that indicates if the report section is visible in the final report

Custom Data Tab

The Custom Data details tab contains metadata information for the selected report. The detailed information for the fields on this tab is described in the following table. You can take actions on the Custom Data tab. The actions include: Adding, Editing, and Deleting Custom Data elements in the list.

Custom Data Tab	
Field	Description
Name	Name of the custom data
Description	Description of the custom data
Custom Data	A bucket field that can be used for any purpose when building your own report
Encrypted	A check box that indicates if the data put in the custom data field should be encrypted when saving to the database

Advanced Tab

The Advanced details tab contains metadata information for the selected report. The detailed information for the fields on this tab is described in the following table.

Advanced Tab	
Field	Description
Report Visible	Check box that indicates if the report is visible in IC Business Manager
Report Type	A list that displays the report type, Active Report or Live Graph--only Active Report is currently supported
Stored Procedure	Stored procedure the report runs to retrieve its data
Stored Procedure Count	Stored procedure run to indicate the size of the total return of the reports stored procedure
Stored Procedure Samp	Stored procedure that returns a subset of the report's stored procedure, usually a collection of single distinct values

Linked Report Friendly Key	This value represents a Friendly Key of another report. The Linked Report Friendly Key is used to link reports, such as when a summary report might have detail links that a user can click to see all the information for a particular detail.
Allow Edit Params	A check box that indicates if the user can edit the report's parameters within IC Business Manager
Allow Count Button	A check box that indicates if the report allows for the stored_procedure_count sproc to be run in IC Business Manager
Require ACL	A check box, selected for true, indicates that the Access Control List is checked to verify that the user has permission to view the report from the report list in Interaction Reporter.
Report Timeout Period	The period of time, in seconds, before the report times out--default is 1800
Notes	User notes field

Related Topics

[Report Configuration Export](#)

[Report Configuration Import](#)

[Report System Settings](#)

[Report Management](#)

Use Report Management to create custom parameters and related report metadata. The reports configured in Report Management are run in Interaction Reporter in IC Business Manager. The Report Configuration page allows you to edit and manage metadata related to a report.

Report Configuration page

The Report Configuration page has two views, The Master View and Details View.

Master View

The master view displays a list of report **Categories** and the **Reports** associated with them.

You can take actions on the master view. The actions include: Adding, Editing, Copying, Deleting, and Ordering Categories and Reports in the lists.

Details View

The details view displays specific information about the item selected in the master view, grouped by tabs.

Report Management groups the metadata information in the details view in the following tabs:

- [General](#)
- [Parameters](#)
- [Flexible Columns](#)

- [Sections](#)
- [Custom Data](#)
- [Advanced](#)

General Tab

The General details tab contains basic information for the selected report. The detailed information for the fields on this tab is described in the following table.

General Tab	
Field	Description
Name	Name of the report
SubTitle	Subtitle of the report
Description	Description of the report
Friendly Key	A unique value that easily identifies the instance in the database
Assembly Name	The assembly within which the report exists
Class Name	The class name that identifies the report with the assembly
Orientation	Identifies if the report is printed in landscape or portrait
IC Data Source	The IC_DataSource of the report
Last Run User	Displays the last user to run the report
Last Run Date	Displays the date and time for when the report was last run
Run Count	The total number of times the report has been run

Parameters Tab

The Parameters details tab contains metadata information for report parameters. The parameter list displays parameters for the selected report in the master view. The parameter information is defined in sub-tabs by: General, Data, Custom Data, Miscellaneous, SQL Table Columns, and the sub-tab fields are defined in the following table. You can take actions on the Parameters tab. The actions include: Adding, Editing, Deleting, and Ordering Parameters in the list.

Parameters Tab		
Sub-tab	Field	Description
General	Name	Name of the parameter
	Description	Description of the parameter
	Friendly Key	A unique value that easily identifies the instance in the database
	Assembly Name	The assembly that houses the parameter

IC Server Manager Administrator Printable Help

	Class Name	The class name of the parameter within the defined assembly
	Required	Check box to select if the parameter is required to run the report
Data	Source	The source of the parameter, user supplied or fixed
	Data Type	The type of data the parameter is expecting, for example, number, date, or string
	Default Value	Default value for the parameter
	Convert Date to GMT	Check box to select if the datetime value of the parameter should be converted to GMT
Custom Data	Custom Data 1	A bucket field that can be used for any purpose when building your own parameters
	Custom Data 2	A bucket field that can be used for any purpose when building your own parameters
	Custom Data 3	A bucket field that can be used for any purpose when building your own parameters
Miscellaneous	Allow Sample	A check box to indicate if the parameter allows for a search of distinct values from the reports stored procedure that uses the stored procedure sample
	Allow Or	A check box to indicate if the parameter supports OR logic
	Allow And	A check box to indicate if the parameter supports AND logic
	Parameter Type	Drop-down box to select parameter type, Filter, Informational, or Threshold
	Visible	A check box to select if the parameter is visible within IC Business Manager
	User Control Assembly Name	The assembly that houses the parameter
	User Control Class Name	The class name of the parameter within the defined assembly
SQL Table Columns	Column Name	The column name the parameter references in the report's stored procedure

	Column Name2	An additional column name to use if the parameter references two columns in the stored procedure
--	--------------	--

Note: You can configure secure report parameters to limit which data users can report on. For more information, see Restrict the visibility of data in reports.

Flexible Columns Tab

The Flexible Columns details tab contains metadata information for the selected report. The detailed information for the fields on this tab is described in the following table. You can take actions on the Flexible Columns tab. The actions include: Adding, Editing, and Deleting Flexible Columns in the list.

Flexible Columns Tab	
Field	Description
Name	Name of the flexible column as used by metadata
Description	Description of the flexible column
Flexible Column Name	Name of the flexible column as shown on the report

Sections Tab

The Sections details tab contains metadata information for the selected report. The detailed information for the fields on this tab is described in the following table. You can take actions on the Sections tab. The actions include: Adding, Editing, and Deleting Sections in the list.

Sections Tab	
Field	Description
Name	Name of the report section
Section Visible	Check box that indicates if the report section is visible in the final report

Custom Data Tab

The Custom Data details tab contains metadata information for the selected report. The detailed information for the fields on this tab is described in the following table. You can take actions on the Custom Data tab. The actions include: Adding, Editing, and Deleting Custom Data elements in the list.

Custom Data Tab	
Field	Description
Name	Name of the custom data
Description	Description of the custom data
Custom Data	A bucket field that can be used for any purpose when building your own report
Encrypted	A check box that indicates if the data put in the custom data field should be encrypted when saving to the database

Advanced Tab

The Advanced details tab contains metadata information for the selected report. The detailed information for the fields on this tab is described in the following table.

Advanced Tab	
Field	Description
Report Visible	Check box that indicates if the report is visible in IC Business Manager
Report Type	A list that displays the report type, Active Report or Live Graph--only Active Report is currently supported
Stored Procedure	Stored procedure the report runs to retrieve its data
Stored Procedure Count	Stored procedure run to indicate the size of the total return of the reports stored procedure
Stored Procedure Samp	Stored procedure that returns a subset of the report's stored procedure, usually a collection of single distinct values
Linked Report Friendly Key	This value represents a Friendly Key of another report. The Linked Report Friendly Key is used to link reports, such as when a summary report might have detail links that a user can click to see all the information for a particular detail.
Allow Edit Params	A check box that indicates if the user can edit the report's parameters within IC Business Manager
Allow Count Button	A check box that indicates if the report allows for the stored_procedure_count sproc to be run in IC Business Manager
Require ACL	A check box, selected for true, indicates that the Access Control List is checked to verify that the user has permission to view the report from the report list in Interaction Reporter.
Report Timeout Period	The period of time, in seconds, before the report times out--default is 1800
Notes	User notes field

Related Topics

[Report Configuration Export](#)

[Report Configuration Import](#)

[Report System Settings](#)

[Report Management](#)

Report Management: Report Configuration Export

Use Report Configuration Export to export the report configuration metadata to an XML format file.

Select the reports to export

To export the metadata for one or more reports, expand the report category and select the reports to be exported to XML format. For example:

You can use **Select All** to select all reports to be exported. And you can use the **De-Select All** to clear your selections and select again.

Specify the destination folder

To specify the destination folder, file name, and export the file:

1. In the **Export File Destination** field, click **Browse**.
2. In the **Save As** dialog, navigate to the destination folder.
3. In the **File Name** field, name your export file. The default file name is ReportConfiguration.xml
4. Click **Save**. The full path name is displayed in the Export File Destination field.
5. Click **Export**. The **Export Completed** confirmation message is displayed.

Related Topics

[Report Configuration Import](#)

[Report System Settings](#)

[Report Configuration](#)

Report Management: Report Configuration Import

Use Report Configuration Import to import the report configuration metadata from a previously exported XML format file.

Import an exported file

To import the metadata from an exported file:

1. In the **Select File** field click **Browse**.
2. In the **Open** dialog, navigate to the saved exported XML file.
3. Select the file to be imported, and click **Open**. The report **Categories/Reports** are displayed in the list.
4. Click **Accept Import**. The **Import Complete** confirmation message is displayed.

Related Topics

[Report Configuration Export](#)

[Report System Settings](#)

[Report Configuration](#)

Report Management: Report System Settings

Use Report System Settings to update reporting system settings, to configure the value for the first day of your work week and set the value for report timeout.

Update Report System Settings

To set the values for report system settings:

1. To set the first day of the week, in the **First Day of Week** drop-down list, select the day to begin your week.
2. To set the report timeout period, use the up and down arrows and select the timeout period in seconds.
3. Click **Save** to save your selections, or click **Revert** to cancel your changes.

Related Topics

[Report Configuration Export](#)

[Report Configuration Import](#)

[Report Configuration](#)

Restrict report results with secure parameters

You can configure secure report parameters that limit which data users can report on based on the access control lists (ACLs) to which they have access.

This help topic contains the following sections:

- [Example of how secure parameters restrict report results](#)
- [Reports that use secure parameters](#)
- [Secure versus non-secure parameters](#)
- [Parameter classes and control classes](#)
- [ACLs that work with secure parameters](#)
- [A note about migrating from an earlier version](#)
- [Example configuration procedures](#)

Example of how secure parameters restrict report results

Suppose your marketing managers want to report on the results of ongoing outbound marketing campaigns. However, you want to ensure that each manager sees only the results for their particular campaigns. You can configure the Dialer reports to use the SecuredAutoCompleteCampaignNameComboBox secure parameter. Then you configure each user's ACL to allow access to select the appropriate campaigns. When a user attempts to run the Dialer reports in IC Business Manager, the user can select only the campaigns that they should see.

Reports that use secure parameters

You can the SecuredAutoCompleteCampaignNameComboBox secure parameter with all Dialer reports that retrieve a campaign name. These include:

- Campaign Statistics
- Call History
- Agent Success Results
- Campaign Success Results

Note: This secure parameter matches on the campaign name.

Secure parameters versus non-secure parameters

For each secure parameter, there is a corresponding non-secure parameter:

- If you choose a secure parameter, then the user is presented with a list of valid parameter choices based on their access control list.
- If you choose a non-secure parameter, then a user type any value for the parameter when the user runs the report. This potentially allows the user to report on sensitive information, or to run reports using invalid (non-existent) parameter values.

The following table displays the secure parameter classes and their corresponding non-secure parameters:

Secure parameter class name	Non-secure parameter class name
SecuredAutoCompleteCampaignNameComboBox	AutoCompleteCampaignNameComboBox
SecuredAutoCompleteUsersComboBox	AutoCompleteUsersComboBox
SecuredDistributionQueueComboBox	DistribututionQueueComboBox
SecuredUserList	UsersList

Parameter classes and control classes

For each secure parameter, you must specify both the parameter class name and the control class. The following table displays the secure parameter classes and the control class that you can use with it.

Secure parameter class name	Control class name
SecuredAutoCompleteCampaignNameComboBox	AutoCompleteComboBox
SecuredAutoCompleteUsersComboBox	AutoCompleteComboBox
SecuredDistributionQueueComboBox	AutoCompleteComboBox
SecuredUserList	UserList

ACLs that work with secure parameters

In addition to configuring a report to use a secure parameter, you must also assign the appropriate ACLs to the users who run reports. The following table lists the ACLs that work with each secure parameter.

Secure parameter class name	ACL
SecuredAutoCompleteCampaignNameComboBox	Interaction Dialer > Campaigns > View
SecuredAutoCompleteUsersComboBox	User Queue > Users/Workgroups > Search
SecuredDistributionQueueComboBox	Workgroup Queue > Workgroups > Search
SecuredUserList	Users Queue > User Queue > View

A note about migrating from an earlier version

Note: Secure report parameters are available in CIC 2016 R3 and later releases. If you configured Crystal Reports that use queue parameters for an earlier version of CIC, you must edit those reports to use either the secure or unsecure parameters.

Example configuration procedures

The following examples show you how to use the various secure parameters, control classes, and ACLs.

- [Configure a report to use the SecuredUserList parameter](#)
- [Configure a report to use the SecureCampaign parameter](#)

Configure a report to use the SecuredUserList parameter

Note: You can configure any report that uses the **UserList** parameter to use the **SecuredUserList** parameter.

Configure a report

1. **Report Management > Report Configuration > Categories**
2. From the Categories list, select the category that contains the report you want to configure.
3. In the Reports list, select the report.
4. On the **Parameters** tab, check the list of parameters for the **UserList** parameter. If it appears, then you can configure the report to use the **SecuredUserList** parameter.

Note: If the **UserList** parameter is not listed, you cannot configure the report to use the **SecuredUserList** parameter.

5. Click the **General** tab.
6. Unlock the report.
7. In the Class Name box, type **ININ.Reporting.Historical.Engine.Module.Parameters.ViewModels.SecuredUserList**.
8. Click **Save**.

Configure the Access Control Lists for each user who runs the report

1. **Users > User Configuration > Security > Access Control**
2. In the Search box, type **user queue**.
3. Under the View column, select the user queues and workgroups on which the user can report.
4. Click **Close**.

Configure a report to use the SecureCampaign parameter

Configure the report

1. In **Report Management**, configure the Dialer report you want.
2. Click the **Parameters** tab.
3. Click the **General** tab and set the following options:

IC Server Manager Administrator Printable Help

- Complete the Name, Name Resource, Description, Description Resource, and Friendly Key fields. For more information, see Report Configuration.
- Select the Required check box.

Note: If you do not select the **Required** check box, then any user can view reports on any campaign they choose.

- In the User Control Assembly Name box, type **ININ.Dialer.Reporting.Historical**.
 - In the User Control Class Name box, type:
ININ.Dialer.Reporting.Historical.Viewmodels.SecuredAutoCompleteCampaignNameComboBox.
 - In the License list, select **_NO_LICENSE_REQUIRED_**
4. On the **Data** tab, set the following options:
 - In the Source box, type **User Supplied**.
 - In the Data Type list, select String.
 - Do not type anything in the Default Value box.
 5. On the **Custom Data** tab, do not type anything in any field.
 6. On the **Miscellaneous** tab, set the following options:
 - Select either Allow Sample or Allow Or.
 - Make sure that the Allow And check box is not selected.
 - Select the Visible check box.
 - In the User Control Assembly Name field, type **ININ.Reporting.Historical.Engine.Module**.
 - In the User Control Class Name field, type
ININ.Reporting.Historical.Engine.Module.Parameters.Views.AutoCompleteComboBox.
 7. On the **SQL Table Columns** tab, in the **Column Name** box, type **campaignname**.
 8. Click **Save**.

Configure the Access Control List for each user who runs the report

1. **Users > User Configuration > Security > Access Control**
2. In the **Search** box, type **campaigns**.
3. Under the View column, select the campaigns on which the user can report.
4. Click **Close**.

Related Topics

[Report Configuration](#)

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Genesys Telecommunications Laboratories, Inc.
2001 Junipero Serra Boulevard
Daly City, CA 94014
Telephone/Fax (844) 274-5992
www.genesys.com